



SirsiDynix®

SirsiDynix Symphony Training Guide

Circulation

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Introduction

The Circulation training guide will provide an understanding of the SirsiDynix Symphony Circulation Module capabilities.

The guide presents circulation in task-driven settings and it is supported by exercises to help you master the training objectives.

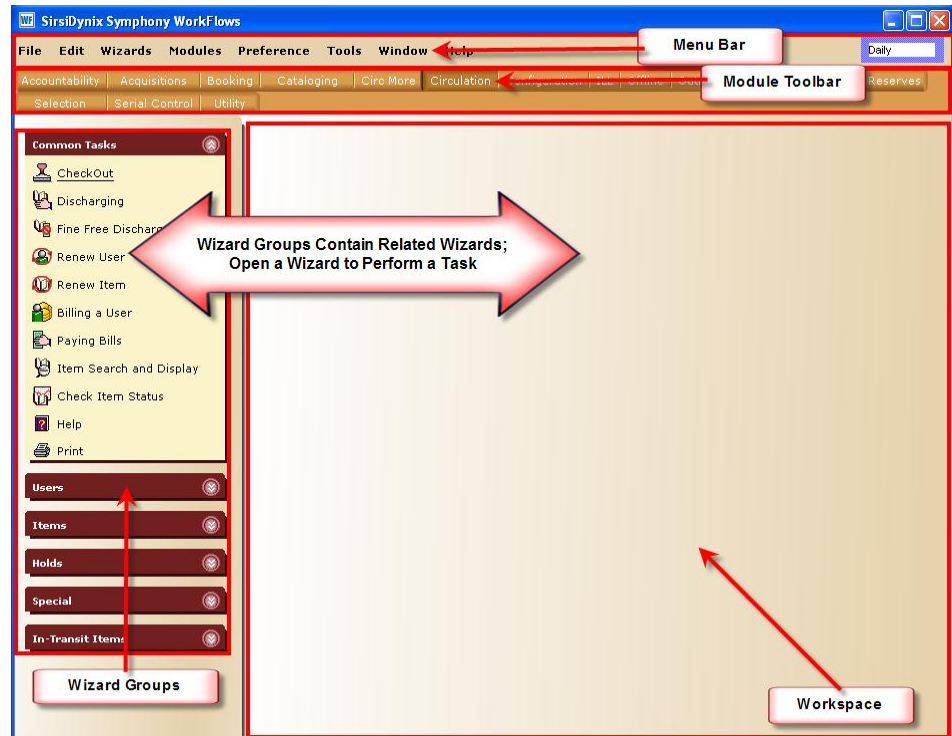
This training guide can accompany instructor-led training. It can also be used as a review, reference, or independent study document.

The goal of this course is to train library staff members so that they in turn may act as trainers for others at their branch, campus, or institution.

The SirsiDynix Symphony Basic Circulation Manual consists of six sections. Below is a short summary of each section:

- **Working with User Records.** Outlines the steps taken to create, copy and modify user records, confirm address information, mark user cards lost and removing user records. User status is also discussed.
- **Circulating Materials.** Details the steps for checking out, renewing and checking in materials, as well as apply and modify due dates.
- **Working with Bills, Fines, and Payments.** Discusses how bills are created, automatically and manually, and how they are paid.
- **Working with Holds.** Introduces how to create, display, modify, remove holds, and reorder a hold queue, as well as create recalls and blanket holds. Trapping holds though onshelf lists is also covered.
- **Working with Items.** Discusses how to create brief records on the fly, change Item IDs, mark items lost, missing, and claims returned.
- **Special Processes.** Introduces how to mark items used, receive in transit items, create circulation statistics for ephemeral items, suspend user privileges and create a set of items to circulate. Additional information on Family card/proxy borrowing and Books by Mail is also mentioned.

The purpose of this training guide is to provide quick and accurate information about using the SirsiDynix Symphony system. This introduction begins with an orientation to the screen layout and how to navigate within the system. When opening SirsiDynix Symphony, a screen like this displays:



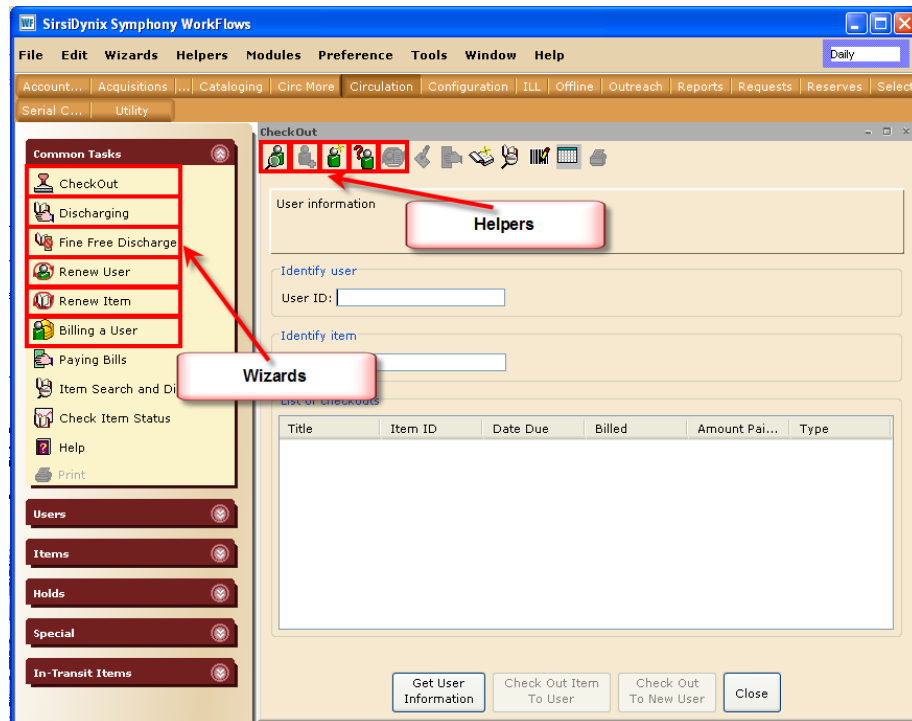
These are the parts of the Symphony screen, as called out in the preceding screen shot:

- **Module Toolbar.** Grants access to available modules. Only modules relevant to your job display. Move between modules by clicking on the module toolbar.
- **Menu Bar.** Provides context-sensitive tools to perform tasks. The system has built-in redundancies (menu bar, buttons, field information, key commands) to perform tasks.
- **Wizard Groups.** Organizes wizards into grouped sets that perform related workflows. The arrow in the upper right-hand corner opens or closes the group. Double click on a wizard to open it on the workspace.
- **Workspace.** Displays the wizards that have been opened. If your system is profiled to do so, windows open one on the top of another so you can have many wizards open at once, moving freely between them.

Wizards and Helpers

Wizards and Helpers are tools used to conduct work within SirsiDynix Symphony. Wizards are labeled icons – the icon visually represents what the tool does, and the label describes the tool’s function. A Helper displays a balloon tooltip when you hover over the icon.

Each entry in a Wizard Group is a wizard. A Helper displays at the top of a workspace in a Helper bar. (A Helper has the same name and label as its equivalent wizard). A Helper is a Wizard that has conveniently been placed inside of a wizard so that related workflows can be addressed from a single reference point.



The *Check In* wizard is the tool you would use when performing Checkin-related workflows. A *User Registration* wizard or Helper is the tool you would use to create a new user on the system.

A library administrator has the ability to organize toolbars and change the labels of wizards. This customization of the SirsiDynix Symphony user interface lets you organize SirsiDynix Symphony for specific groups of people or those performing a specific job function.

Using This Training Guide

This guide has been designed for use during a SirsiDynix instructor-led training. It also has been designed to be used as a reference work for the class. Icons are used throughout the manual for different purposes. The purpose of each icon is described below.



This icon denotes additional helpful information.



This icon is a warning. Pay special attention to this information!



This icon indicates reference information available in another manual or to another chapter within this manual.

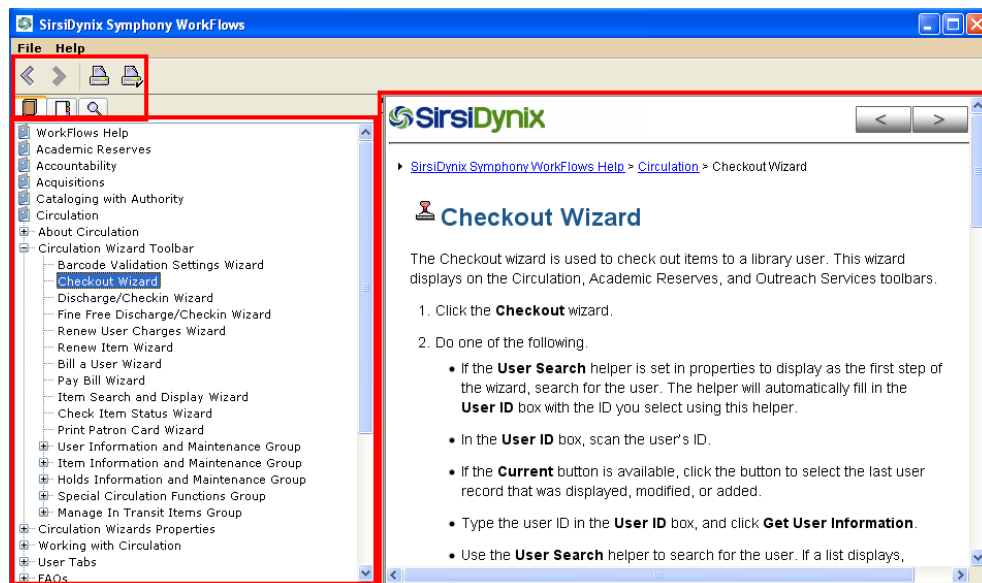


This icon directs you to the SirsiDynix Symphony online Help file where you can find additional or related information.

Help Files

The SirsiDynix Symphony system comes with an extensive set of online Help files. Every toolbar in your SirsiDynix Symphony system has a Help icon (a purple book with a yellow question mark on it). You can access Help files through the toolbar icon, from the Help option on your menu bar, or by pressing the F1 key when within SirsiDynix Symphony.

Help files are organized either context sensitive to the screen presently displaying, or topically through a table of contents:



The Help File screen has been divided into three parts for explanation:

- Icons are available to move forwards and backwards through the Help topics, to print, to access an index, and to search.
- Information is organized topically in the left-hand window. Click on a plus sign (+) to open a folder; click on a minus sign (-) to close it.



- The Help file is presented in the right-hand window. The information in the Help file assists in understanding more about software functionality and how to perform relevant workflows.



When you need help with a task, consult the online Help Files first. Your online Help Files are a comprehensive information set of SirsiDynix Symphony WorkFlows.

Searching Basics

Searching for records within the SirsiDynix Symphony client is straight forward. In each case you are searching the database for records – once you find the desired record you put it to use in the current workflow.

When using SirsiDynix Training Guides, specific tasks will instruct you to “search for a record,” or, “perform a search and select a record.” This section reviews the basics of searching for and selecting records in SirsiDynix Symphony.

To search for a user record:

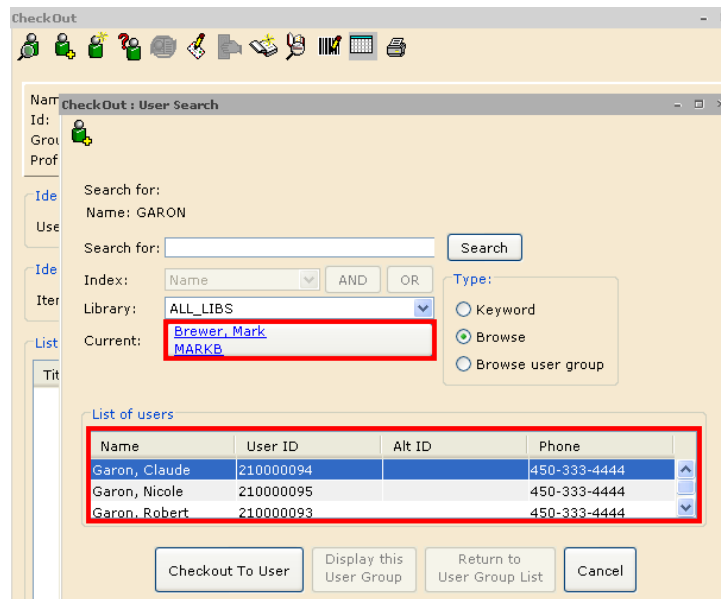
1. Open the *Checkout* wizard.
2. Click on the *User Search* helper at the top of the Checkout window. A user search pop-up like this one displays:

The screenshot shows the 'Checkout' window with the 'User Search' pop-up. The pop-up has a search bar labeled 'Search for:' with a 'Search' button. Below this are dropdown menus for 'Index' (set to 'Name') and 'Library' (set to 'ALL_LIBS'), with 'AND' and 'OR' buttons between them. To the right, under 'Type:', there are radio buttons for 'Keyword' (selected), 'Browse', and 'Browse user group'. Below these is a table titled 'List of users' with columns 'Name', 'User ID', 'Alt ID', and 'Phone'. At the bottom of the pop-up are buttons: 'Checkout To User', 'Display this User Group', 'Return to User Group List', and 'Cancel'. At the bottom of the main 'Checkout' window are buttons: 'Get User Information', 'Check Out Item To User', 'Check Out To New User', and 'Close'.

The *User Search* and *Item Search* helpers are highlighted at the top of the window. Within the Search window there are options to specialize a search by index, Boolean operators, library, or type.

3. Enter a search term, refining it with any of the special search functions, and click **Search**.

The system displays the results of your search. When there are multiple matches to your search, they display as a list in the lower part of the window:



CheckOut : User Search

Search for: Name: GARON

Search for: Search

Index: Name AND OR

Library: ALL_LIBS

Current: **Brewer, Mark**
MARKB

Type: ☐ Keyword ☒ Browse ☐ Browse user group

List of users

Name	User ID	Alt ID	Phone
Garon, Claude	210000094		450-333-4444
Garon, Nicole	210000095		450-333-4444
Garon, Robert	210000093		450-333-4444

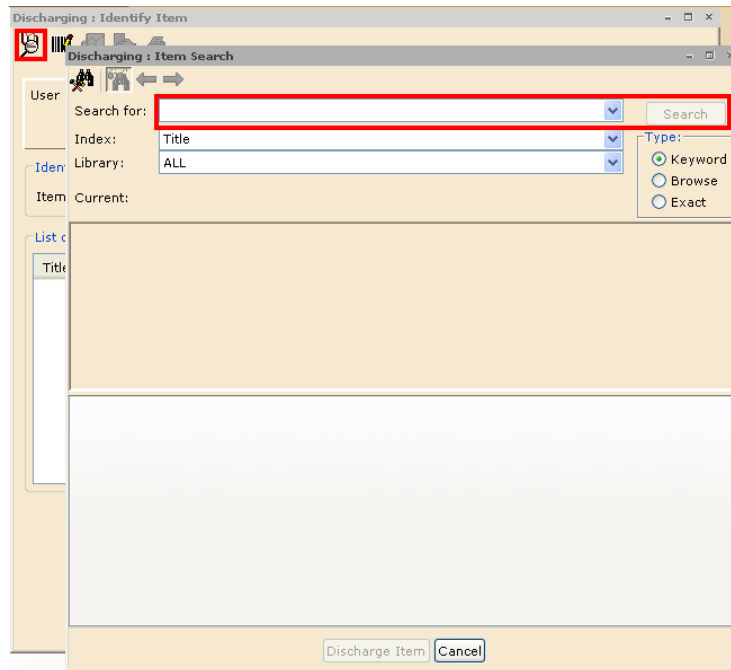
Checkout To User Display this User Group Return to User Group List Cancel

Notice that the most recent (current) borrower displays by default. The names that matched your search entry display in list form.

4. Select the desired user and click **Checkout to User**.

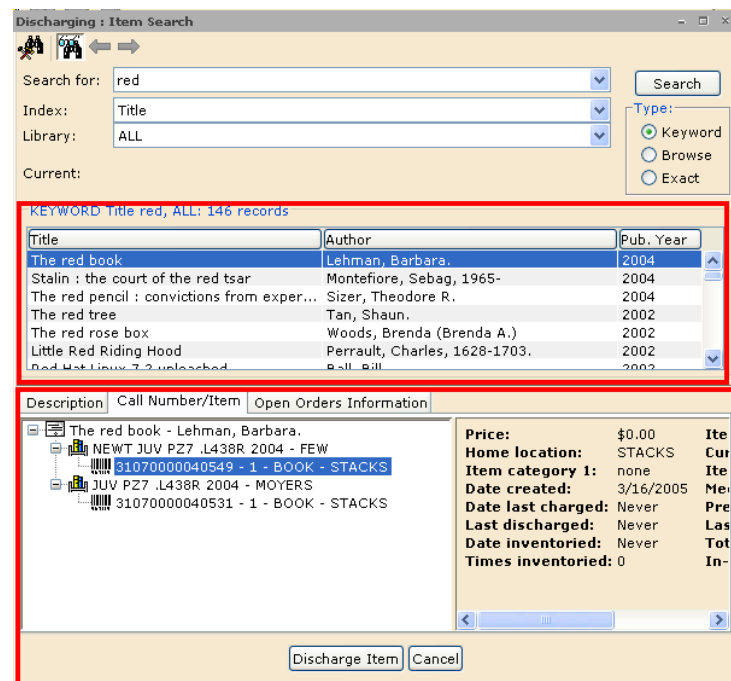
To search for an item record:

1. Click on the *Check In* wizard.
2. Click on the *Item Search* helper. An Item Search window displays:



3. Enter a search term, refining it with any of the special search functions, and click **Search**. Within the Search window there are options to specialize a search by index, library, or type.

Your search results display:



Matches display in the upper window, while bibliographic, call number, and item information display in the lower window.

4. Select the desired item and click **Discharge Item** to check the book back in. The system automatically directs you if there is block, fine, transit, or other information for the item.



Working with User Records

In this section, we will introduce the tasks related to user records, such as creating, copying, modifying, and deactivating.

In this section you will learn to:

- Create user records
- Display user records
- Copy a user record
- Modify user records
- Confirm address information
- Replace a lost card
- Update a user's privileges
- Bar a user

User Record Overview

Each user in SirsiDynix Symphony must have a unique identification called the User ID. The user ID can be a number or name assigned by the library according to some scheme. Typically, library use random numbers for unique user identification, such as barcodes. This number may be scanned to perform circulation functions including check out materials, place holds, and create bills.

Library users are able to log onto the online catalogue using their user ID to perform secured functions such as placing holds, view checkouts and bills, and renew checked out items.

To maintain consistency, library staff should decide which conventions (e.g., using all caps, or mixed case lettering) to use when entering information in the user record.

User records do not only represent the people who borrow material, but library staff logins as well. Staff log in into the WorkFlows client – the staff interface – using a user record that controls access to job-related functionality. These user records (logins) contain a special profile that defines staff privileges. Privileges granted by login might include


permissions to run reports, delete items, and participate in other basic circulation tasks.

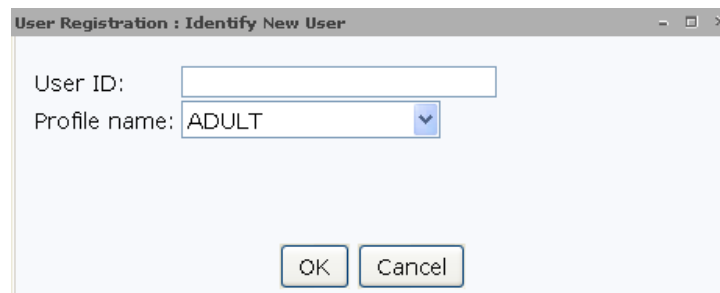
SirsiDynix Symphony also utilizes user records to assign a status or condition to an item. For example, some libraries will check out items that need to be removed from the collection to a “DISCARD” user record.

Creating a User Record

The *User Registration* wizard is used to create a new user record in your library.

To create a new user:

1. Navigate to the Circulation toolbar and open the Users group of wizards.
2. Click the *User Registration* wizard.  User Registration
3. Select a Profile Name using the drop down, if necessary. This determines a user’s privileges like loan period and fine rate.



The image shows a screenshot of a software dialog box titled "User Registration : Identify New User". It contains two input fields: "User ID:" with an empty text box, and "Profile name:" with a dropdown menu currently showing "ADULT". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

4. Scan the library card barcode into the User ID field, or type the User ID and select **OK**.

User ID, Profile Name, Last Name, and Library are the only required fields to save a new user record

Id: 210008203
Group ID:
Profile name: PUBLIC...

Basic Info | Privilege | Demographics | Addresses | Extended Info | User groups

Title:
First name:
Preferred name: ☐ Use preferred name
Middle name:
Last name: ****NAME-NOT-YET-SUPPLIED****
Suffix:
Alt ID: ☒ Allow routing
Group ID:
Library: ARROWOOD
Profile name: PUBLIC
Charge history rule: CIRCRULE

Save Register Another User Close

5. In the Last Name field, type in the user's last name.
6. In the First Name field, type in the user's first name.
7. Enter a preferred name and/or middle name, if necessary.
8. Select the Use Preferred Name box if the user wants his or her preferred name to display in WorkFlows and in the e-Library. This name will also print in reports.

Basic Info | Privilege | Demographics | Addresses | Extended Info | User groups

Title:
First name: Daniel
Preferred name: Dan ☒ Use preferred name
Middle name:
Last name: Stevens
Suffix:
Alt ID: ☒ Allow routing
Group ID:
Library: ARROWOOD
Profile name: PUBLIC
Charge history rule: CIRCRULE

It is not necessary to enter a comma after the last name

9. Enter an Alt ID if necessary. This field can be an individually significant number like a Social Security number, Student ID number, or driver's license number. The Alt ID provides alternative access to user's record. Depending on the system's configuration, users may be able to log in to the online catalog using an Alt ID.
10. Enter a Group ID if necessary. An example is to use the name of a homeroom teacher (e.g., JOHNSON) as a Group ID for all the

children's user records. Group IDs can be used to search a group of users or sort notice reports.

11. Verify the Library policy that will be tied to the user record. This is considered the user's home library.
12. Verify the Profile Name. This field carries over the value entered from the *User Registration* wizard. You can change this now if you previously selected the incorrect profile.



A user record can be saved with just the User ID, User Profile, Last Name and Library fields populated. You can enter the other information at a later time using the *Modify User* wizard.

13. To continue filling in the user information, click the **Demographics** tab.

The screenshot shows the 'User Registration' window with the 'Demographics' tab selected. The window has a title bar with standard OS controls. Below the title bar, there's a header area with a small icon and the text 'Id: 210008203', 'Group ID:', and 'Profile name: PUBLIC...'. Below this is a tabbed interface with tabs for 'Basic Info', 'Privilege', 'Demographics' (which is active), 'Addresses', 'Extended Info', and 'User groups'. The 'Demographics' tab contains several fields: 'User cat1:', 'User cat2:', 'User cat3:', 'User cat4:', 'User cat5:', 'Department:', 'Birth date:', and 'Language:'. Each category field has a dropdown menu. The 'Language' dropdown is set to 'ENGLISH'. The 'Birth date' field has a calendar icon. At the bottom of the window, there are three buttons: 'Save', 'Register Another User', and 'Close'.

14. Using the drop down fields, fill in the appropriate user categories. These are used for statistical purposes.
15. To enter the user's birth date, click the *Birth Date* gadget and use the calendar to establish a date. Click **OK**.
16. Use the Language drop down to choose the language this user prefers for receiving notices.
17. Click the **Addresses** tab.

User Registration

Id: 210008203
Group ID:
Profile name: PUBLIC...

Basic Info | Privilege | Demographics | **Addresses** | Extended Info | User groups

Primary: ☒ Address 1 ☐ Address 2 ☐ Address 3

Address 1

PHONE
DAYPHONE
HOMEPHONE
LINE
STREET
CITY/STATE
ZIP
EMAIL
LOCATION

Save Register Another User Close



Do not use the drop down fields to change an address field label! Doing so may suppress any entered data. System administrators can make modifications to delivered address templates.

18. Enter up to three addresses.
19. Click Address 1, Address 2, or Address 3 to select the primary address which will be used when running notice reports.
20. If the user prefers to have notices emailed, type the user's full email address in the EMAIL field.

Basic Info | Privilege | Demographics | **Addresses** | Extended Info | User groups

Primary: ☒ Address 1 ☐ Address 2 ☐ Address 3

Address 1

PHONE 314-887-2937
DAYPHONE
HOMEPHONE
LINE
STREET 12344 Olive Boulevard
CITY/STATE Creve Coeur, MO
ZIP 63141
EMAIL dstevens@email.com
LOCATION

21. Enter any other necessary information in the other tabs provided.



Refer to Appendix D to learn how to add a user to a new group or add a user to an existing group.

22. Click **Save** to register the new user.
23. A confirmation window appears. Select one of the following options:
 - **Register Another User** to register another user.
 - **Make More Changes** to make more changes to this user registration.
 - **Clone/Copy to New User** to create a new user based on the user you just created.
 - **Close** to exit the wizard.

Note: Your library can choose to make available a helper that lets you display a photo of the user when that record is accessed, (like in the CheckOut or Display User windows.) This Update User Photo helper allows you to load individual patron photos from an image file, capture and save photos from a webcam, or delete an existing photo. Patron photos can also be loaded in a batch. For more information on this, see the Helps for “Update User Photo Helper” and “Batch User Photo Utility.”

Displaying a User Record

Use the *Display User* wizard to view user information such as status, checkouts, bills, holds, and extended information.

To view a user's record:

1. Within the Users group of wizards, click the *Display User* wizard.



Display User



2. Scan the barcode from the user's card, or type the User ID and click **Display This User**.
3. Click the **Summary** tab to see the user's activity such as status, profile, and the number of checkouts, bills, and/or holds.

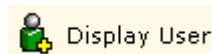
Holds	Routings	Reservations	Outreach	Suspension	Charge History	User Groups
Summary	Addresses	Extended Info	Bills	Checkouts		
User key: 204				Privilege expires: NEVER		
Status is: OK				Group ID:		
Profile name: PUBLIC				Group name:		
User cat1: MALE...				User cat2: ENGLISH...		
User cat3: MASTERS...				User cat4:		
User cat5:				Birth date: 10/21/1968		
Library: ARROWOOD...				Age: 42		
Language: ENGLISH				Charge history rule: CIRCRULE		
Next allowed loan date:		Amount owed: none	Credit balance: none			
Checkouts: none		Unpaid bills: none	Holds: none			
Extended info: yes		Bookings: none	Routings: none			
Claims returned: none		Orders: none	Distributions: none			
Outreach user: no			Requests/messages: none			



The *User Search* helper is available from many windows in the Circulation Module. You can use this helper to locate users when you do not have the User ID.

To search for a user:

1. Click the *Display User* wizard.



2. Click the *User Search* helper.



Search for: Search

Index: AND OR

Library:

Current:

Type: ☒ Keyword ☐ Browse ☐ Browse user group

List of users

Name	User ID	Alt ID	Phone
			<input type="text" value="Phone"/>

Display this User Display this User Group Return to User Group List (b) Cancel

3. In the Search For box, type either a name or a search criterion.
4. Select a search Type using the drop down and select the Index you want to search.
5. If necessary, use the drop down to select a specific library.
6. Click **Search**. All records fitting the criteria you entered will display in the List of Users.

Search for: Search

Index: AND OR

Library:

Current:

Type: ☒ Keyword ☐ Browse ☐ Browse user group

List of users

Name	User ID	Alt ID	Phone
Bailey, Keith	210000071		555-5557
Bailey, Samuel	210000072		555-5558
Bailey, Stephanie	210000073		555-5559
Bailey, Carolyn	210000074		555-5560

Display this User Display this User Group Return to User Group List (b) Cancel

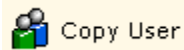
7. Highlight a user and click **Display this User** to view the user's record.
8. When you are finished viewing the information, click **Close**.

Copying a User Record

The *Copy User* wizard transfers data from non-unique fields into a new user record. This wizard is useful when registering an entire family if the address information is the same.

To copy a user record:

1. Within the Users group of wizards, click the *Copy User* wizard.



2. Search for the user record using one of the available indexes and select **Search**.

A screenshot of the 'Copy User : User Search' dialog box. It features a search bar at the top with a 'Search' button. Below the search bar are dropdown menus for 'Index:' (set to 'Name'), 'Library:' (set to 'Line'), and 'Current:' (set to 'Line3'). To the right of these are 'AND' and 'OR' buttons. Further right is a 'Type:' section with radio buttons for 'Keyword' (selected), 'Browse', and 'Browse user group'. A 'List of use' section on the left shows a list of fields: Name, Note, Phone, Previous ID, Previous ID2, Social Sec.#, Staff, Street, Student ID, User ID, Web Authentication, and Work phone. The 'Name' field is highlighted. At the bottom, there are buttons for 'Display this User Group', 'Return to User Group List', and 'Cancel'.

3. If you receive a list of users, highlight the one you want to copy and click **Clone/Copy User**. If one match is found, you are taken to the Copy User screen.

Copy User : Entering Info for Stevens

Name: Stevens, Dan
 Id: 206
 Group ID:
 Profile name: PUBLIC...

Creating new user by copying information from:

User ID: 210008203
 Phone: 314-887-2937
 Street: 12344 Olive Boulevard
 City, state: Creve Coeur, MO
 Zip: 63141
 Email: dstevens@email.com

Basic Info | Privilege | Demographics | Addresses | Extended Info | Outreach | User groups

Title:
 First name:
 Preferred name:
 Middle name:
 Last name: Stevens
 Suffix:
 User ID: 206
 Alt ID:
 Group ID:
 Library: ARROWOOD
 Profile name: PUBLIC
 Charge history rule: CIRCRULE

☐ Use preferred name
☒ Allow routing

Save (s) Clone/Copy This User to Another Close (b)

4. In the **Basic** tab, enter information for a new user such as first name, preferred name, and middle name. Change the Profile Name, if necessary.

Basic Info | Privilege | Demographics | Addresses | Extended Info | Outreach | User groups

Title:
 First name: Cassandra
 Preferred name: Cassie
 Middle name:
 Last name: Stevens
 Suffix:
 User ID: 206
 Alt ID:
 Group ID:
 Library: ARROWOOD
 Profile name: JUVENILE
 Charge history rule: CIRCRULE

☒ Use preferred name
☒ Allow routing

You may need to change the Profile Name

5. Scan or type the User ID for the new user. This will replace the auto-generated User ID initially created.



If you scan a barcode, you may see a list of next steps. To continue filling in the user information, select **Make More Changes** at this point.



6. Click the **Demographics** tab.
7. Add or edit existing demographics information.

The screenshot shows the 'Demographics' tab selected in a wizard. The tabs are: Basic Info, Privilege, Demographics, Addresses, Extended Info, Outreach, and User groups. The Demographics section contains the following fields:

- User cat1: FEMALE (dropdown)
- User cat2: ENGLISH (dropdown)
- User cat3: MIDDLE (dropdown)
- User cat4: (empty dropdown)
- User cat5: (empty dropdown)
- Department: (empty text field)
- Birth date: (empty date field with a calendar icon)
- Language: ENGLISH (dropdown)

8. Click the **Addresses** tab.
9. Make any necessary changes to the user's address.

The screenshot shows the 'Addresses' tab selected in the wizard. The tabs are: Basic Info, Privilege, Demographics, Addresses, Extended Info, Outreach, and User groups. The Addresses section shows 'Primary: Address 1' selected with radio buttons. Below this, 'Address 1' is expanded to show a list of address fields:

- PHONE: 314-887-2937
- DAYPHONE: (empty)
- HOMEPHONE: (empty)
- LINE: C/O Dan Stevens
- STREET: 12344 Olive Boulevard
- CITY/STATE: Creve Coeur, MO
- ZIP: 63141
- EMAIL: (empty)
- LOCATION: (empty)

10. Click **Save**.
11. Click **Clone/Copy This User to Another** to create another user record with the same information or click **Close** to exit the wizard.



System administrator can determine in wizard properties whether User ID field is auto-generated and if Extended Information should be cloned.

Modifying a User Record


The *Modify User* is used to change an existing user record. The following wizards can also be used to modify specific user information within SirsiDynix Symphony:

- Confirm Address

- User Lost Card
- Renew User Privilege
- Bar a User

Modify User Wizard

To modify a user's information:

1. Within the Users group of wizards, click the *Modify User* wizard.
 Modify User
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for a user.
3. Within the **Basic** tab, make any necessary changes. For example, to change a User ID, scan or type in the new number.

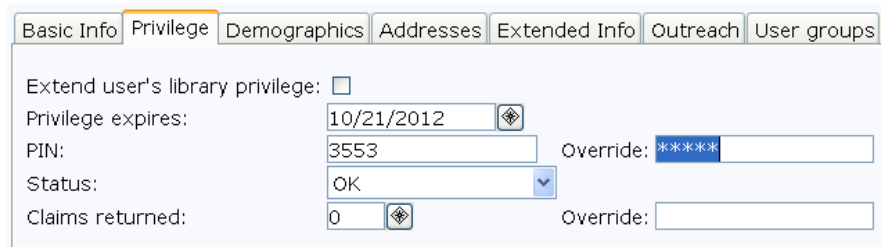


Staff can also mark a card lost with the *User Lost Card* wizard discussed later in this section.



To add another active User ID, use the *User ID Manager* helper if available.

4. To change the user's PIN, click the **Privilege** tab.
5. Type in the new PIN and enter the appropriate override.



The screenshot shows the 'Privilege' tab of the 'Modify User' wizard. The tabs at the top are: Basic Info, Privilege (selected), Demographics, Addresses, Extended Info, Outreach, and User groups. The form contains the following fields:

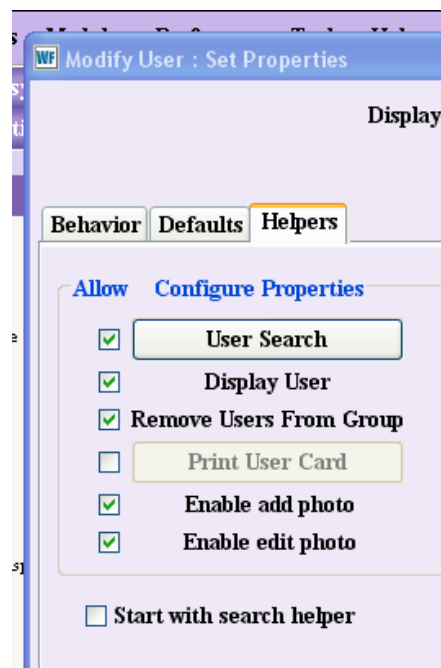
- Extend user's library privilege: ☐
- Privilege expires: 10/21/2012 (with a calendar icon)
- PIN: 3553 (with a text input field)
- Status: OK (with a dropdown menu)
- Claims returned: 0 (with a text input field)
- Override: ***** (with a text input field)
- Override: (with a text input field)



Override codes are established and provided by the system administrator.

6. To add or modify address information, click the **Addresses** tab and make the changes.
7. Make any other necessary changes to the user's record.
8. Click **Save**.


9. After the user record has been modified, select one of the following options:
- **Modify Another User** to modify a different user record.
 - **Make More Changes** to make more changes to this user.
 - **Close** to exit the wizard.
10. Note: If a library chooses to display a photo when the user's records is accessed (in the *Check Out* or *Display User* wizards, for example), two helpers can be enabled that allow you to add or edit these photos. That option appears in the property of the *Modify User* wizard.

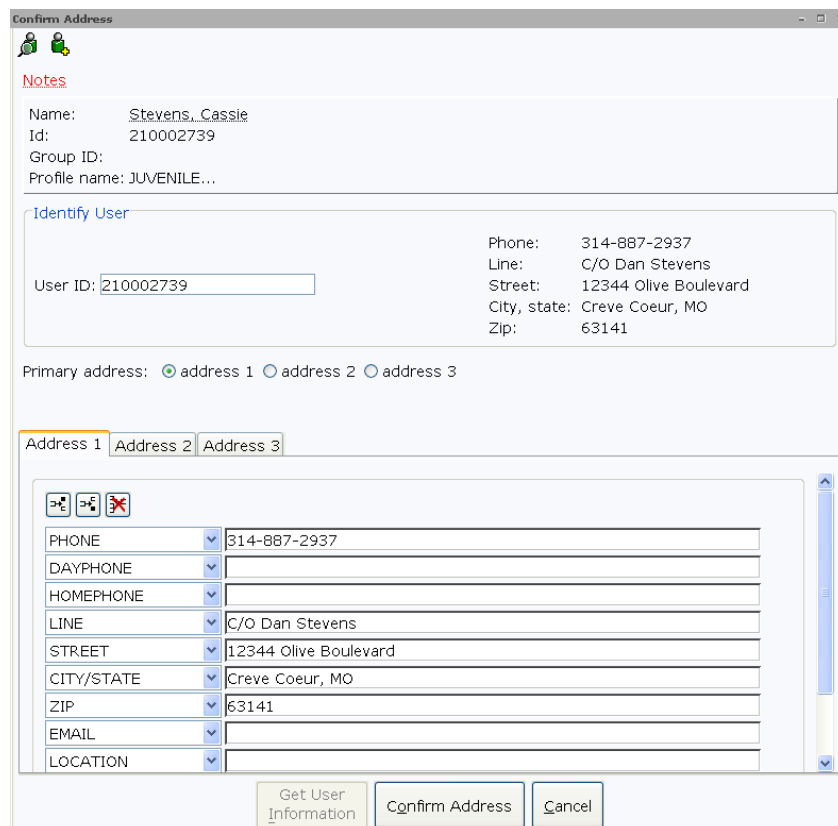


Confirm Address Wizard

The *Confirm Address* wizard gives quick access to a user's address information without displaying the user's complete record. Staff can display and edit address information using this wizard.

To confirm a user's address:

1. Within the Users group of wizards, click the *Confirm Address* wizard.
 Confirm Address
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.



3. Make any necessary changes to the address information and click **Confirm Address**.



Do not use the drop down fields to change an address field label! Doing so may suppress any entered data. System administrators can make modifications to delivered address templates.

4. After the user record has been modified, select one of the following options:
 - **Modify Another User Address** to modify a different user address.
 - **Make More Changes to Address** to make additional changes to the user's address
 - **Close** to exit the wizard.




Staff can also use the *Confirm Address* helper within the *Checkout* wizard to accomplish the same task.

User Lost Card Wizard

The *User Lost Card* wizard allows staff to inactivate a user's lost card and issue a new card. WorkFlows copies the user information from the lost card to the new card. If the user has checkouts, bills, or holds, these records are transferred to the new card.

To mark a card lost:

1. Open the Special group of wizards and click the *User Lost Card* wizard.  User Lost Card
2. Search for the user's existing record.
3. If a list of users appears, select the correct user name and click **Assign New Card**.

User Lost Card

Notes

Name: Bailey, Stephanie
 Id: 210000773
 Group ID:
 Profile name: ADULT...

Identify user

User ID: 210000773

Street: 5557 Anystreet
 City, state: Spanish Fork, UT
 Zip: 86668
 Phone: 555-5559

Assign new ID to existing user

New user ID:

Summary | Addresses | Extended Info | Bills | Checkouts | Holds | Routings | Bookings | Reservations

User key: 110 Privilege expires: NEVER
 Status is: OK Group ID:
 Profile name: ADULT Group name:
 User cat1: FEMALE... User cat2: ENGLISH...
 User cat3:
 User cat4:
 User cat5: Birth date: NEVER
 Library: ARROWOOD... Age: 0
 Language: ENGLISH Charge history rule: CIRCRULE

Get User Information Assign New Card (g) Mark Another User's Card Lost Close

4. Scan the barcode or type the new User ID and click **Assign New Card**.

Complete

Bailey, Stephanie
 has been assigned user ID: 210000773

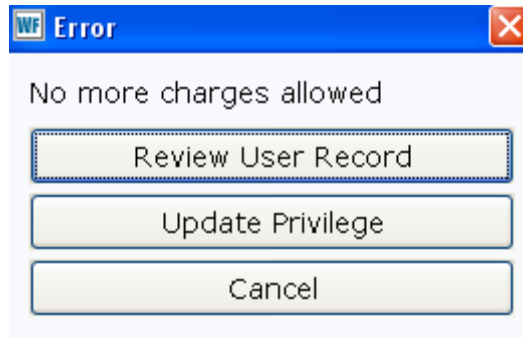
Lost user ID: 210000773
 has been deactivated with profile: LOSTCARD.

Mark Another User's Card Lost

Close

5. Click **Close** to exit the wizard.

If someone tries to checkout materials with a deactivated card, staff will receive the following message in the *Checkout* wizard:



If it is configured, this wizard can prompt staff to automatically create a replacement fee for the lost card. This can be set up by the system administrator.


Renew Privilege

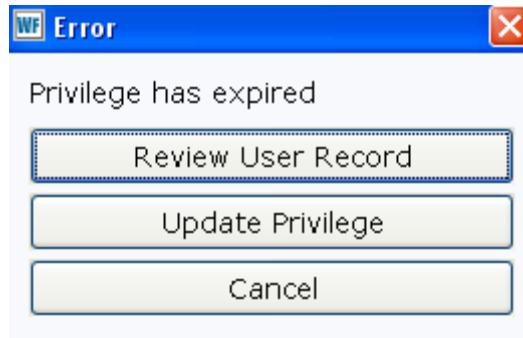
Use the *Renew Privilege* wizard to renew user privileges when they expire or are about to expire. The *Renew Privileges* helper can be used to accomplish the same task within the *Checkout* wizard, which is the more likely place to see that a user's privilege has expired.



Renewing privilege renews for a full segment of time beginning with the first day of the renewal. The privilege limit is set in the user's Profile policy.

To renew a user's expired privilege during checkout:

1. Within the Common Task group of wizards, click the *Checkout* wizard.  Checkout
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. If the user's privileges have expired, staff will see the following message:



4. To review the user's record information, click **Review User Record**.

Alerts

Name: Dunn, Gerald
Id: 210000069
Group ID:
Profile name: STUDENT...

Identify user

User ID: 210000069

Street: 2771 E. Elm
City, state: St. Louis, MO
Zip: 63132
Phone: 314-228-2931

Summary | **Addresses** | Extended Info

User key: 106
Status is: OK
Profile name: STUDENT
User cat1: MALE...
User cat3:
User cat5:
Library: FEW...
Language: ENGLISH

Privilege expires: 10/20/2010
Group ID:
Group name:
User cat2: ENGLISH...
User cat4:
Birth date: NEVER
Age: 0
Charge history rule: CIRCRULE

Next allowed loan date:
Checkouts: none
Extended info: none
Claims returned: none
Outreach user: no

Amount owed: none
Unpaid bills: none
Bookings: none
Orders: none

Credit balance: none
Holds: none
Routings: none
Distributions: none
Requests/messages: none

Extend privilege (a) | Cancel


5. Click **Extend privilege**.



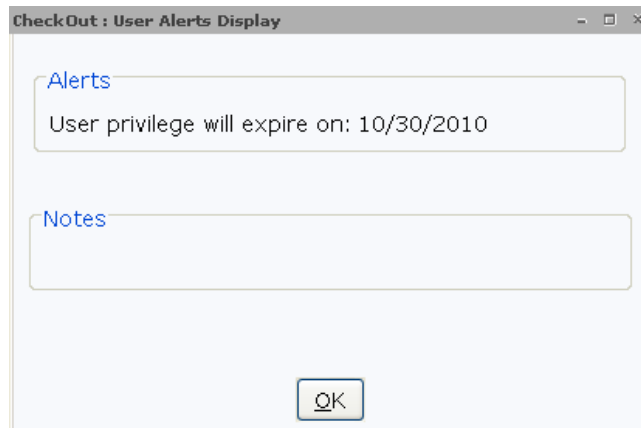
If address information is not correct, extend the user's privilege and use the *Confirm Address* helper to make modifications.

6. Proceed with checking out materials to the user.

To renew a user's privilege that will expire soon:

1. Within the Common Task group of wizards, click the *Checkout* wizard.  Checkout

2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Click **OK**.




CheckOut : User Alerts Display

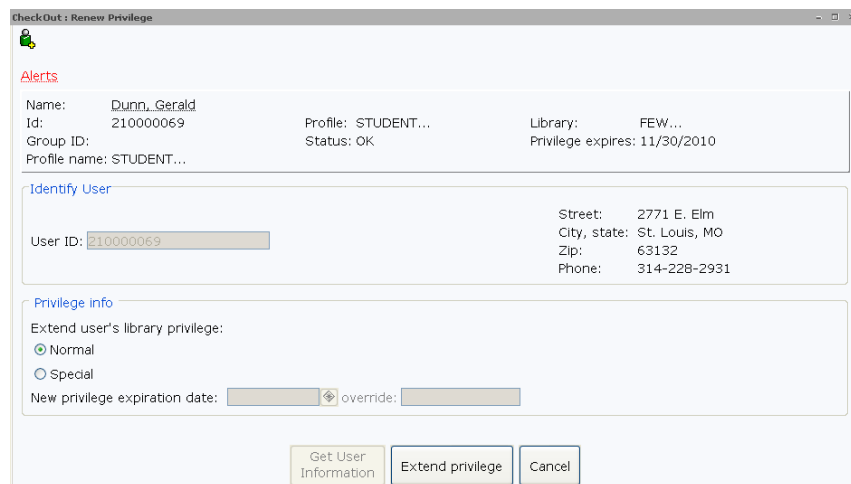
Alerts

User privilege will expire on: 10/30/2010

Notes

OK

4. Confirm address information using the *Confirm Address* helper.
5. Click the *Renew Privilege* helper. 



CheckOut : Renew Privilege

Alerts

Name: Dunn, Gerald
Id: 210000069
Group ID:
Profile name: STUDENT...

Profile: STUDENT...
Status: OK

Library: FEW...
Privilege expires: 11/30/2010

Identify User

User ID: 210000069

Street: 2771 E. Elm
City, state: St. Louis, MO
Zip: 63132
Phone: 314-228-2931

Privilege info

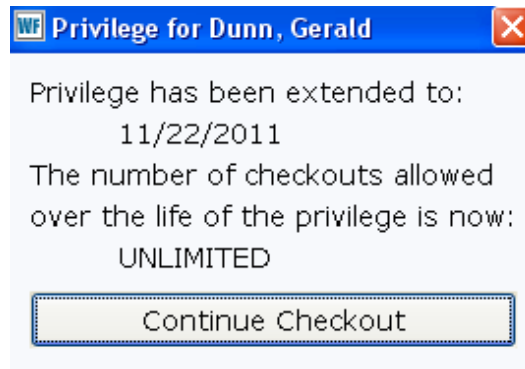
Extend user's library privilege:

☒ Normal
☐ Special

New privilege expiration date: override:

Get User Information Extend privilege Cancel

6. Click **Extend Privilege**.
7. Click **Continue Checkout**.

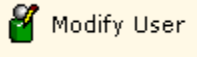


8. Proceed with checking out materials to the user.

Barring a User

You can prevent a user from using library services by manually editing the user record and setting the status to BARRED.

To bar a user:

1. Open the Users group of wizards and Click the *Modify User* wizard.

2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Click the **Privilege** tab.
4. Using the Status drop down, select BARRED from the list.
5. Type in the Override.

6. To inform staff of the reason for being barred, click the **Extended Info** tab and add a note.

Basic Info | Privilege | Demographics | Addresses | **Extended Info** | Outreach | User groups

NOTE: Patron has been barred for inappropriate use of public access computers.

COMMENT:

LOSTITEM:

INACTVID:

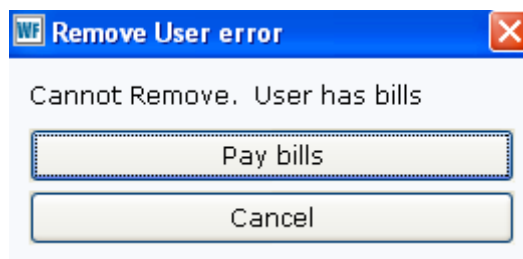
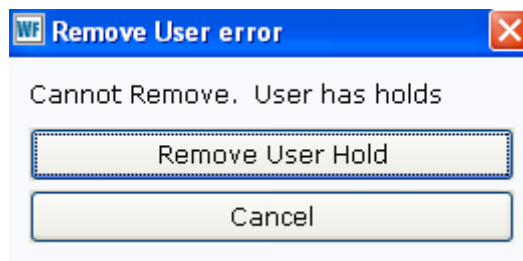
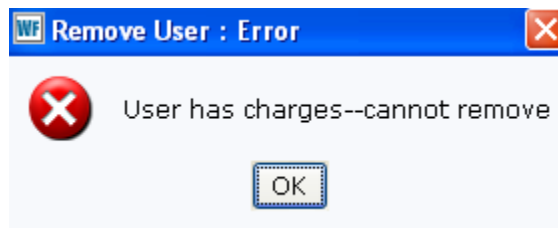
ACTIVEID:

7. Click **Save**.


Removing a User Record

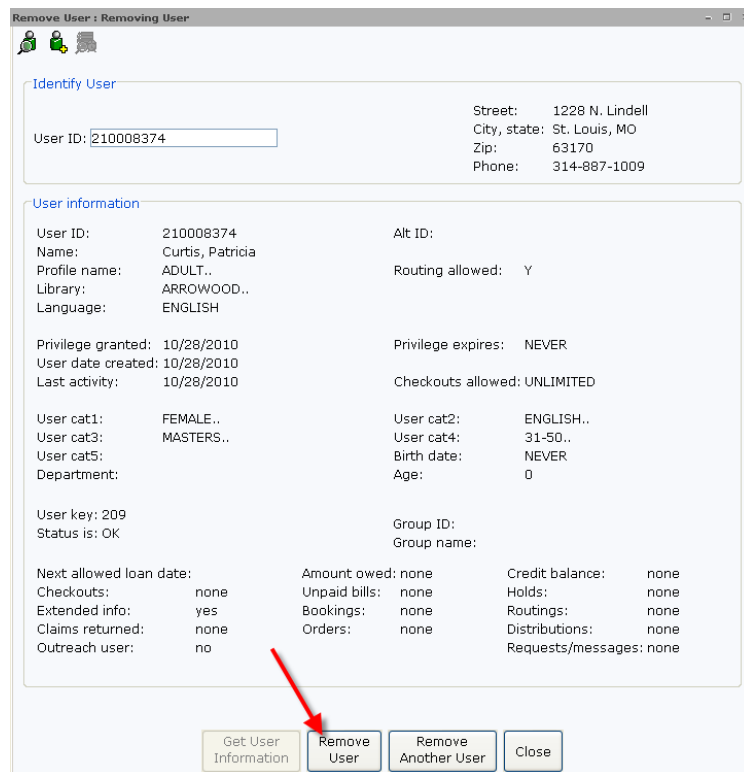
Use the *Remove User* wizard to manually remove user records that are no longer needed. It is also possible to remove user records in batch with the Remove Users report.

With both methods, a user cannot be removed if the user has items currently checked out, holds, unpaid bills, unanswered requests, belongs to a profile that prevents users from being removed, or has a charge history. Within the wizard, if the record cannot be removed because of one of these conditions, an alert window will display. You must address the reason for the alert before you can remove the user record. Below are some of the messages you may receive:



To remove a user record:

1. Within the Users group of wizards, click the *Remove User* wizard.
 Remove User
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Review the user information and click **Remove User**.



Remove User : Removing User

Identify User

User ID: 210008374

Street: 1228 N. Lindell
City, state: St. Louis, MO
Zip: 63170
Phone: 314-887-1009

User information

User ID:	210008374	Alt ID:	
Name:	Curtis, Patricia	Routing allowed:	Y
Profile name:	ADULT..		
Library:	ARROWOOD..		
Language:	ENGLISH		
Privilege granted:	10/28/2010	Privilege expires:	NEVER
User date created:	10/28/2010	Checkouts allowed:	UNLIMITED
Last activity:	10/28/2010		
User cat1:	FEMALE..	User cat2:	ENGLISH..
User cat3:	MASTERS..	User cat4:	31-50..
User cat5:		Birth date:	NEVER
Department:		Age:	0
User key:	209	Group ID:	
Status is:	OK	Group name:	
Next allowed loan date:		Amount owed:	none
Checkouts:	none	Unpaid bills:	none
Extended info:	yes	Bookings:	none
Claims returned:	none	Orders:	none
Outreach user:	no	Credit balance:	none
		Holds:	none
		Routings:	none
		Distributions:	none
		Requests/messages:	none

Get User Information Remove User Remove Another User Close

4. Click **Remove Another User** to remove another user record or click **Close** to exit the wizard.



For more information about removing user records, see the [WorkFlows online Help file "FAQs: Removing User Records."](#)

Common Circulation Tasks

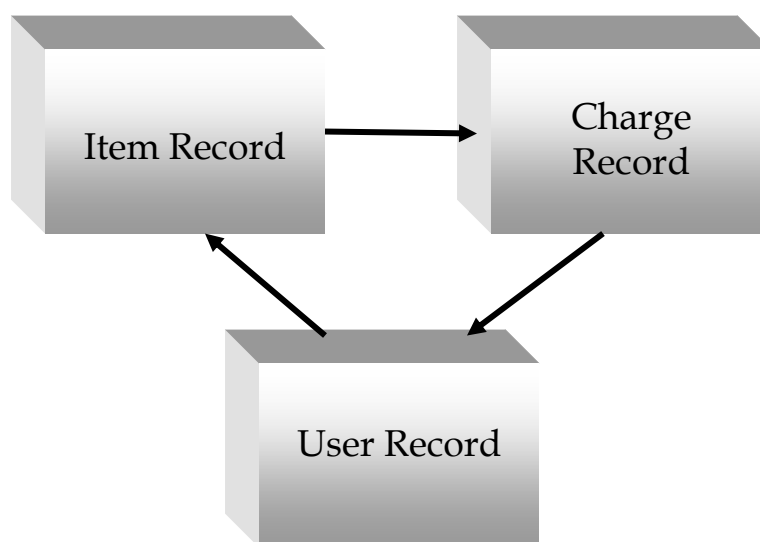
In this section, we introduce the basic tasks of circulating materials—check out, renewal, and checking in. You will also learn how to apply special due dates at check out as well as modifying existing due dates.

In this section you will learn to:

- Check out items
- Modify due dates before and after check out
- Renew a list of user's items or items in hand
- Check in items
- Backdate items put in the book drop

Checking Out Materials

When you check out an item to a user, WorkFlows creates a charge record to store relevant data and links the user record to the charge record. The charge record contains the item identifier, the user identifier, the date and time the item was charged, and the date and time the item is due back. It may include billing information if an item is overdue, recalled, or has associated bills.



You can manually enter the date due when the user checks out the item, or Symphony can assign due dates based on circulation rules on the item

type and user profile policies. When you discharge or check in the item, WorkFlows removes the charge record from the database.




The system can be configured to keep track of user checkouts with Charge History. The Charge History record is very similar to a charge record, and is linked to an item record and a user record only when the user checks out and later checks in the item. For more information, see the WorkFlows online Help file “FAQs: Using Charge History.”



If you try to checkout items to a user with a BLOCKED status, you can determine the reason for the status and take actions to resolve the user's Blocked status (if desired). You can then continue with the checkout process. For more information, see the WorkFlows online Help file “FAQs: Checking Out Materials.”

Standard Checkout

To check out materials:

1. Within the Common Tasks group of wizards, click the *Checkout* wizard.  **Checkout**
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Scan the item barcode in the Item ID field, or type the Item ID and select the **Check Out Item to User**.
4. Continue to check out all of the items to the user.

Notes

Name: Martin, Claire
 Id: 210000083
 Group ID:
 Profile name: STUDENT...

Identify user

User ID:

Street: 2020, rue des Yeux-Ouverts
 City, state: Montréal, QC
 Zip: J4Z 3P2
 Phone: 450-654-9876

Identify item

Item ID:

List of checkouts: 2

Title	Item ID	Date Due	Billed	Amount Paid...	Type	Set...
Colonial house [vi...	310700000...	10/28/2010,23:59			DVD	
Shaken faith : ha...	310700004...	11/4/2010,23:59			BOOK	

Get User Information Check Out Item To User Check Out To New User Close

5. Click **Check Out To New User** to check out materials to the next user or click **Close** to exit the wizard.





If the workstation has a receipt printer, a date due slip will print at this point if they have been configured in the wizard properties.

Applying a Special Due Date

For items that need to be checked out for a shorter or longer length of time, the *Special Due Date* helper will assist staff with this task.

To use a special due date:

1. Click the *Checkout* wizard.  **CheckOut**
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Click the *Special Due Date* helper. 
4. Click the *Special Due Date* gadget and using the calendar select the desired due date. Click **OK**.

5. Select when to use the special due date: From now on, For this user only, or For this checkout only.

The dialog box is titled "CheckOut : Enter Special Due Date". It contains a text field for "Special due date:" with the value "11/18/2010,23:59" and a calendar icon. Below this are three radio buttons: "From now on", "Use special due date: For this user only", and "For this checkout only" (which is selected). At the bottom are "OK" and "Cancel" buttons.

6. Click OK.


The "CheckOut" window shows user information for "Murphy, Elizabeth" (ID: 210000007). It has sections for "Identify user" (with a User ID field), "Identify item" (with an Item ID field and a "Current:" dropdown showing "Colonial house [video... DVD E188 .C65 2004 DVD 31070000032975]"), and a "List of checkouts" table. A red box highlights the text "Special date due will be used: 11/18/2010,23:59". At the bottom are buttons: "Get User Information", "Check Out Item To User", "Check Out To New User", and "Close".

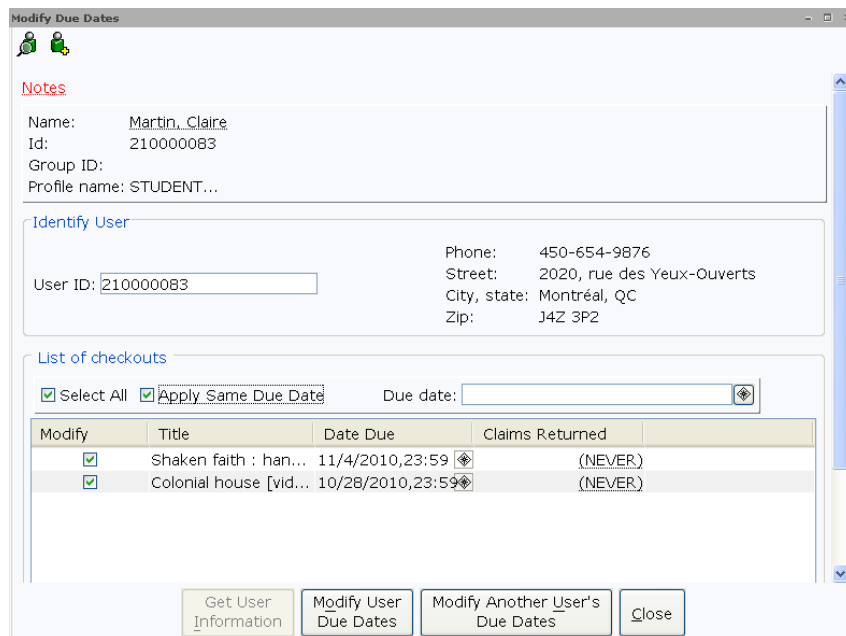
7. Scan the item barcode in the Item ID field, or type the Item ID and select the **Check Out Item to User**.
8. Click **Check Out To New User** to check out materials to the next user or click **Close** to exit the wizard.

Modifying Existing Due Dates

The *Modify Due Dates* wizard changes a due date after an item has been checked out. Unlike using *Renew User* or *Renew Item* wizard, this wizard does not affect renewal limits that might be established in the circulation policies.

To modify due dates:

1. Open the Special group of wizards and Click the *Modify Due Dates* wizard.  **Modify Due Dates**
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Select one or more of the items, or click the Select All box.
4. Click the Apply Same Due Date check box.



The screenshot shows the 'Modify Due Dates' wizard window. It has a 'Notes' section with user details: Name: Martin, Claire; Id: 210000083; Group ID; Profile name: STUDENT... Below this is the 'Identify User' section with a 'User ID' field containing '210000083' and contact information: Phone: 450-654-9876, Street: 2020, rue des Yeux-Ouverts, City, state: Montréal, QC, Zip: J4Z 3P2. The 'List of checkouts' section has checkboxes for 'Select All' and 'Apply Same Due Date' (both checked), and a 'Due date' field. Below is a table with columns: Modify, Title, Date Due, and Claims Returned. Two items are listed: 'Shaken faith : han...' and 'Colonial house [vid...'. At the bottom are buttons: 'Get User Information', 'Modify User Due Dates', 'Modify Another User's Due Dates', and 'Close'.

Modify	Title	Date Due	Claims Returned
<input checked="" type="checkbox"/>	Shaken faith : han...	11/4/2010,23:59	(NEVER)
<input checked="" type="checkbox"/>	Colonial house [vid...	10/28/2010,23:59	(NEVER)

5. Click **Modify User Due Dates**. The new due date will not be applied until you click this button.
6. Click **Close**.

Renewing Materials

WorkFlows offers two ways to renew items: *Renew User* and *Renew Item*. The system assigns the new due date based on the date of actual renewal, not the original due date.

Users can also renew materials by themselves in e-Library.


Renew User Wizard

The *Renew User* wizard can renew all or some of a user's items charged in one step. This wizard is helpful when users renew items over the phone or if they do not have the items physically present.



If you try to renew items to a user with a **BLOCKED** status, you can determine the reason for the status and take actions to resolve the user's Blocked status (if desired). You can then continue with the renewal process. For more information, see the WorkFlows online Help file "FAQs: Checking Out Materials."

To renew some or all of a user's items:

1. Within the Common Tasks group of wizards, click the *Renew User* wizard.  Renew User
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Select one or more items to renew, or click the Select All box.

Renew User

Notes

Name: Brown, Patricia
 Id: 210000004
 Group ID:
 Profile name: ADULT...

Identify User

User ID:

Street: 5558 Anystreet
 City, state: Spanish Fork, UT
 Zip: 86669
 Phone: 555-5560

Current user checkouts

Items eligible for renewal: 2

☐ Select All ☒ Select all seen

Renew	Seen	Title	Item ID	Date Due	Reserve	Status	Type
<input type="checkbox"/>	<input checked="" type="checkbox"/>	For one m...	310000102	10/21/2010,23...			BOOK
<input type="checkbox"/>	<input checked="" type="checkbox"/>	The day I s...	30947000...	11/4/2010,23:59			BOOK


Get User Information Renew Selected Items (o) Renew for this User (b) Renew for Another User (g) Close

4. If you want the renewal to be recorded as a “seen” renewal (item is physically present for renewal), select the Mark Item as Seen check box, if not already selected.

5. Click **Renew Selected Items**.

If item(s) cannot be renewed, staff can type in an override code to allow renewal. Item(s) which are successfully renewed, will appear in the Item(s) Renewed list Items which could not be renewed will appear in the Not renewed list.

Holds Block Override

 Item has holds

FIC ALB Copy: 1
 310000102
 For one more day
 Albom, Mitch, 1958-

Hold block override:

Override & Renew Items Do Not Renew Items

Renew User

Notes

Name: Brown, Patricia
 Id: 210000004
 Group ID:
 Profile name: ADULT...

Identify User

User ID:

Street: 5558 Anystreet
 City, state: Spanish Fork, UT
 Zip: 86669
 Phone: 555-5560

1 Item was renewed 1 Item(s) Not Renewed

Item(s) Renewed

Title	Reserve	Date Due
The day I swapped my dad fo...		11/4/2010,23:59

Not renewed


Title	Reserve	Date Due
For one more day		10/21/2010,23:59

Get User Information Renew Selected Items (o) Renew for this User (b) Renew for Another User (g) Close

6. Click **Close**.

Renew Item Wizard

To renew a single checked out item:

1. Within the Common Tasks group of wizards, click the *Renew Item* wizard.  **Renew Item**
2. If you want the renewal to be recorded as a “seen” renewal (item is physically present for renewal), select the Mark Item as Seen check box, if not already selected.

Renew Item

Identify item

Item ID:

Current: The day I swapped my ...
E GAI
30947000270591

☒ Mark Item as Seen

Item(s) Renewed

Title	Name	Date Due	Amount Billed	Amount Paid ...
-------	------	----------	---------------	-----------------

Renew Item (o) Clear Renew List Close

3. Scan the item barcode. The item now appears in the Item(s) Renewed list.

Renew Item

Identify item

Item ID:

☒ Mark Item as Seen

Item(s) Renewed

Title	Name	Date Due	Amount Billed	Amount Paid...
This wide and...	Curtis, Cliff	1/4/2011,23:59		

Renew Item (o) Clear Renew List Close

4. Click **Close**.




The *Checkout* wizard properties can be set to automatically renew items already checked out.

Checking In Materials

There are three ways to check in items: *Check In*, *Discharging Bookdrop* and *Fine Free Discharge*.

Check In Wizard

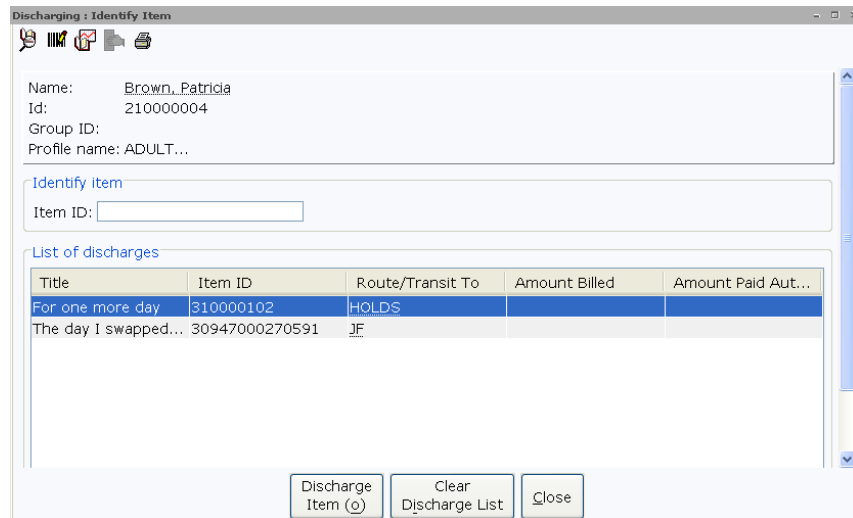
To discharge/check in items:

1. Within the Common Tasks group of wizards, click the *Check In* wizard.  Check In
2. Scan the item barcode or type the item ID and click **Discharge Item**.



The system will indicate with a message whether an item should be put in transit to another library or if it should be put on the hold shelf. Click **Put Item in Transit** to send to a different location. Click **OK** to make the hold available.

3. Continue to scan items until all items are checked in.



Title	Item ID	Route/Transit To	Amount Billed	Amount Paid Aut...
For one more day	310000102	HOLDS		
The day I swapped...	30947000270591	JF		

4. Click **Close**.




System administrator can configure hold slips, hold wrappers, transit slips and/or reshelving slips within the *Check In* wizard.

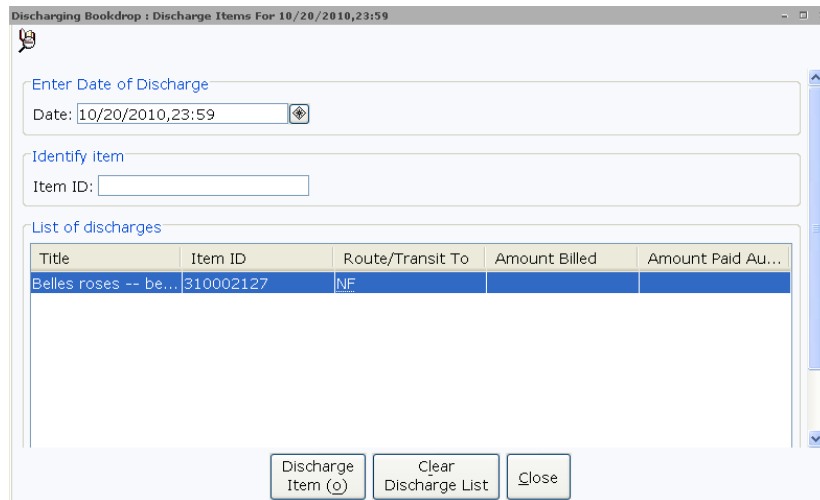


Discharging Bookdrop Wizard

Use the *Discharging Bookdrop* wizard to check in items left in the book drop and backdate the discharge (check in) date. This is helpful when users return items after hours. It also can be used when the library closes for unexpected reasons and due dates were assigned on the days it was closed.

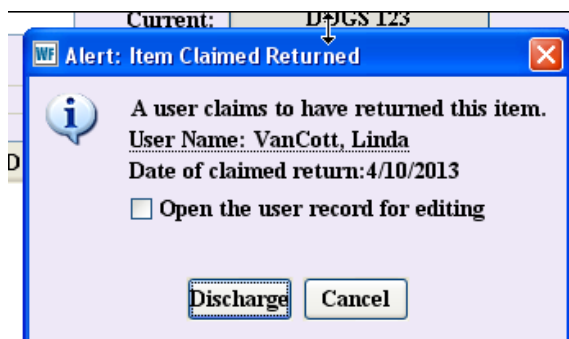
To backdate items when checking in:

1. Open the Special group of wizards and Click the *Discharging Bookdrop* wizard.  Discharging Bookdrop wizard.
2. Click the *Date* gadget to select an appropriate date.
3. Scan the item barcode or type the item ID and click **Discharge Item**.



Title	Item ID	Route/Transit To	Amount Billed	Amount Paid Au...
Belles roses -- be...	310002127	NF		

4. Continue to scan items until all items are checked in.
5. Note: If the item was claimed returned, you can enable a popup that alerts you and allows you to choose to edit the user's record.



Alert: Item Claimed Returned

A user claims to have returned this item.
User Name: VanCott, Linda
Date of claimed return: 4/10/2013

☐ Open the user record for editing

Discharge Cancel

- 6.


7. Click **Close**.

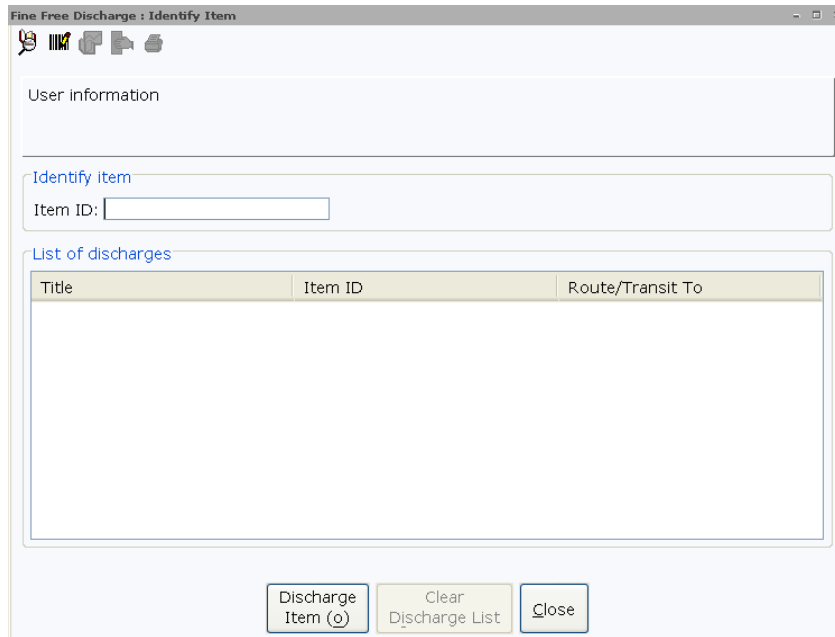


System administrator can configure hold slips, hold wrappers, transit slips and/or reshelving slips within the *Discharging Bookdrop* wizard.



To check in items for which you do not want to collect fines:

1. Within the Common Tasks group of wizards, click the *Fine Free Discharge* wizard.  Fine Free Discharge



Title	Item ID	Route/Transit To
-------	---------	------------------

2. Scan the item barcode or type the item ID and click **Discharge Item**.
3. Continue to scan items until all items are checked in.
4. Click **Close**.



This wizard can be used for libraries that have a fine free day or an amnesty day.

Working with Fines, Bills, and Payments

Your library may ask users to pay for services such as photocopying, printing, computer time, or equipment rental. Some libraries may also bill for library cards, for checking out materials, or placing and filling hold requests. Bills that are not associated with items (e.g. printing, photocopying) are referred to as 'fees.' Bills associated with overdue items are referred to as 'fines.'

A bill record contains a fixed amount that the user owes the library. It also contains the reason, associated title, date billed, item due date, and other pertinent information.

The screenshot shows a web application window titled "Display User : Glossary". It contains two main sections: "Item information" and "Bill information".

Item information:

Title:	Anton Rubinstein : a life in music	ID:	310000653
Author:	Taylor, Philip, 1949 May 30-2007.		
Call#:	780.92 TAY		
Copy:	1		

Bill information:

Billed:	\$30.00	Date:	10/12/2010	Reason:	DAMAGE
# payments:	1	Number of notices:	0	Last notice:	
Still owes:	\$0.00	Date paid:	10/21/2010	Library:	ARROWOOD
Transaction date: 10/12/2010					
Payments:					
Payment date:	10/21/2010	Amount:	\$30.00	Payment type:	CREDITCARD
Payment library:	ARROWOOD				

At the bottom of the window is a "Close" button.

SirsiDynix Symphony creates bills automatically based on library policies. Staff may also create bills manually using the *Billing a User* wizard. You can view bills from the user record, or if the bill is associated with an item, by displaying the item's record.

In this section you will learn to:


- Create a bill manually
- View user bills (paid as well as unpaid)
- Pay bills
- Handle damaged material
- Suspend and unsuspend users

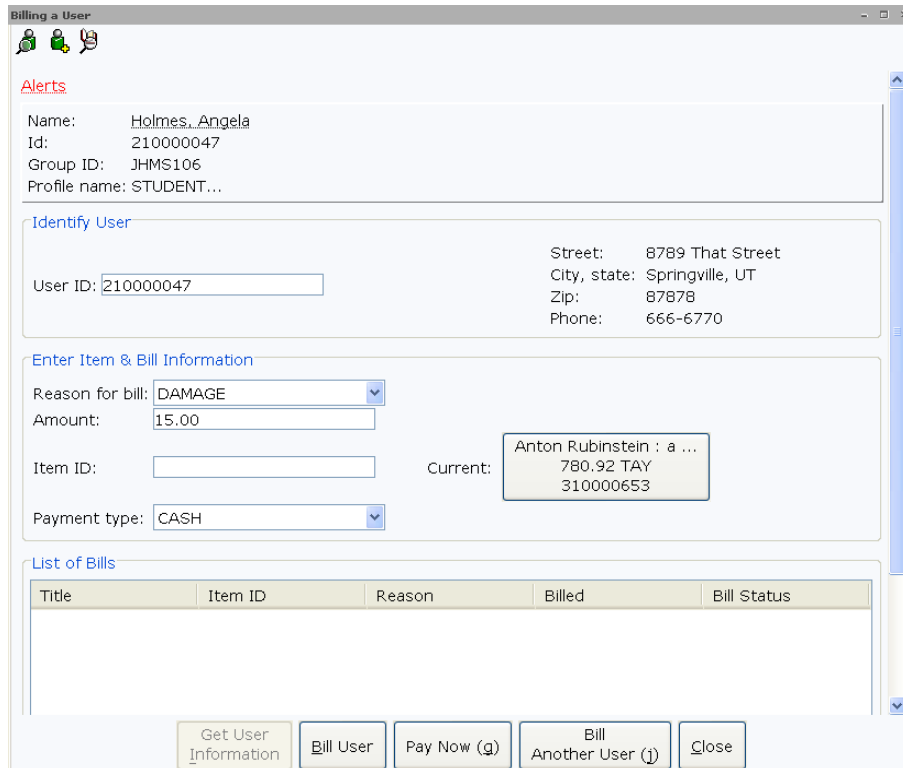


Billing a User

The *Billing a User* wizard is used when staff must manually create a bill.

To create a bill:

1. Within the Common Tasks group of wizards, click the *Billing a User* wizard.  **Billing a User**
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Using the drop down, select a reason for the bill.
4. In the Amount field, type in the amount using the XX.XX format. The currency sign is not necessary.



Alerts

Name: Holmes, Angela
Id: 210000047
Group ID: JHMS106
Profile name: STUDENT...

Identify User

User ID:

Street: 8789 That Street
City, state: Springville, UT
Zip: 87878
Phone: 666-6770

Enter Item & Bill Information

Reason for bill:

Amount:

Item ID:

Payment type:

Current: Anton Rubinstein : a ...
780.92 TAY
310000653

List of Bills

Title	Item ID	Reason	Billed	Bill Status
-------	---------	--------	--------	-------------

Get User Information Bill User Pay Now (g) Bill Another User (j) Close

5. If you are creating a bill that pertains to a specific item, scan the item barcode or type in the item ID. You can also use the *Item Search* helper to identify the item to be used for the bill.
6. If the user is going to pay the entire bill now, select a Payment Type using the drop down.

- Click **Pay Now** to pay the bill in full, or click **Bill User** to add the bill to the user's account.

Billing a User

Alerts Notes

Name: Holmes, Angela
Id: 210000047
Group ID: JHMS106
Profile name: STUDENT...

Identify User

User ID: 210000047

Street: 8789 That Street
City, state: Springville, UT
Zip: 87878
Phone: 666-6770

Enter Item & Bill Information

Reason for bill: [dropdown]
Amount: [text field]
Item ID: [text field]
Payment type: CASH [dropdown]

List of Bills

Title	Item ID	Reason	Billed	Bill Status
Standardized child...	310000368	DAMAGE	15.00	Billed


Get User Information Bill User Pay Now (g) Bill Another User (j) Close

- Click **Bill Another User** to bill a different user or click **Close** to exit the wizard.

Viewing Bill History

A bill record, when attached to an item, can be viewed in the user record or the item record.

To view bills in the user record:

- Open the Users group of wizards and click the *Display User* wizard.
 Display User
- Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
- Click the **Bills** tab to display a list of unpaid bills.

Display User

[Alerts](#) [Notes](#)

Name: Pierce, Eric
 Id: 210000031
 Group ID:
 Profile name: ADULT...

[Identify user](#)

User ID:

Street: 5555 Anystreet
 City, state: Spanish Fork, UT
 Zip: 86666
 Phone: 555-5557

Routings Reservations Outreach Suspension Charge History User Groups
 Summary Addresses Extended Info Bills Checkouts Holds

Unpaid bills: 1(\$10.00)

Title	Item ID	Reason	Owes	Billed	Date	Payment library
Forgive us our ...	30947000...	DAMAGE	\$10.00	\$10.00	10/22/2010	

Display this User (o) Display Another User Close

- To view paid bills, use the Bills drop down and select Paid.

Routings Reservations Outreach Suspension Charge History User Groups
 Summary Addresses Extended Info Bills Checkouts Holds

Title	Item ID	Reason	Owes	Billed	Date	Payment library
Forgive us our ...	30947000...	DAMAGE	\$10.00	\$10.00	10/22/2010	

Display options
 Library: Bills:

Display this User (o) Display Another User Unpaid

- To view detailed information about the paid bill, click the glossary in the Owes column.

Paid bills: 2(\$0.00)

Title	Item ID	Reason	Owes	Billed	Date	Payment library
		PRIVILEGE	\$0.00	\$25.00	10/22/2...	ARROWOOD
History of West...	97162-1001	ILL	\$0.00	\$2.50	10/22/2...	ARROWOOD

Item information

Title: History of Western music ID: 97162-1001
 Author:
 Call#: ILL
 Copy: 1

Bill information


Billed: \$2.50 Date: 10/22/2010 Reason: ILL
 # payments: 1 Number of notices: 0 Last notice:
 Still owes: \$0.00 Date paid: 10/22/2010 Library: ARROWOOD
 Transaction date: 10/22/2010

Payments:
 Payment date: 10/22/2010 Amount: \$2.50 Payment type: CASH
 Payment library: ARROWOOD

Close

- Click **Close** to exit the wizard.

To view bills in the item record:

- Within the Common Tasks group of wizards, click the *Item Search and Display* wizard.  Item Search and Display
- Type in your search terms, change Index and Type, as desired, and click **Search**.
- If you receive a hit list, highlight the record you want to display and click **Detailed Display**.

Item Search and Display

Search for: forgive
 Index: Title
 Library: ALL
 Search

Current: [Staunton, Ted, 1956- --- Forgive us our Traverses / Ted Staunton --- JF STA --- ID:30947000204...](#)

KEYWORD Title forgive, ALL: 4 records

Title	Author	Pub. Year
Forgive us our Traverses / Ted Staunton	Staunton, Ted, 1956-	2000
Helping clients forgive : an empirical guide for resolving ...	Enright, Robert D.	2000
How to forgive yourself and others : steps to reconcilia...	Tobin, Eamon.	1993
I cannot forgive	Vrba, Rudolf.	1964

Description | Call Number/Item

Leader am1 0n
 Date/time stamp 20070515141322.0
 Fixed field data 050428n xx eng u
 LCCN C009101977
 ISBN 0889952078
 Event capture data 010214 010214
 Local system # 00009324
 Local LC call number JF STA mn 00016789
 Personal Author [Staunton, Ted, 1956-](#)
 Title [Forgive us our Traverses / Ted Staunton.](#)
 Publication info Calgary, Alta. Red Deer Press c2000
 Physical description 60 p. ; 19 cm.

Detailed Display Close

- If it does not immediately display, click the **Call Number/Item** tab.



- Click the **Bills** tab.

- Click **Close** to exit the wizard.

Paying Bills

The *Paying Bills* wizard is used to accept payments for a user's current bills. You can apply payments for each individual bill or for the total amount owed, from the oldest bill to the most recent.



Overdue fines are not recorded in bills until the items have been checked in with the *Check In* or *Discharging Bookdrop* wizards.

Paying All Bills

To pay a user's entire bill:

- Within the Common Tasks group of wizards, click the *Paying Bills* wizard.  Paying Bills

2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. To apply a payment to the total amount owed, type the amount into the Payment field using the XX.XX format. The currency sign is not required.
4. Using the drop down, select the Payment Type.



Payment types of CANCEL and FORGIVEN can be used to waive bills.

5. Click **Pay Bills**. If the user overpays, the system automatically calculates the difference in the change field.
6. After the bill has been paid, select one of the following options:




- **Pay More Bills** to continue making payments for this user.
- **Make Payments for Another User** to accept payments from another user.
- **Close** to exit the wizard.



To pay bills for group members, use the *Pay User Group Bills* helper.

To pay an individual bill:

1. Within the Common Tasks group of wizards, click the *Paying Bills* wizard.  **Paying Bills**
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. In the Individual Bills and Payments list, type the amount in the Payment box next to each specific item using the XX.XX format. The currency sign is not required.
4. Using the drop down, select the Payment Type.

Total bills and payments

Total bills: 3 Payment:

Total owed: \$22.50 Payment type: CASH

Still owes: \$22.50 Change:

Credit balance: none

Individual Bills and Payments

Title	Item ID	Reason	Owes	Payment Type	Payment	Change	Billed	Date
Forgive us our ...	30947000...	DAMAGE	\$5.00	CASH			\$10.00	10/22/2...
Moon, have you...	30947000...	DAMAGE	\$15.00	CASH			\$15.00	10/22/2...
		MISC	\$2.50	CASH	2.50		\$2.50	10/22/2...

Payment Type dropdown menu options: CASH, CHECK, CREDITACCT, CREDITCARD, DEBITCARD, FORGIVEN, NONE, PAYFEES

Buttons: Get User Information, Pay Bills (Q), Make Payments, Another User, Close



Payment types of **CANCEL** and **FORGIVEN** can be used to waive bills.

5. Click **Pay Bills**.
6. After the bill has been paid, select one of the following options:
 - **Pay More Bills** to continue making payments for this user.

- **Make Payments for Another User** to accept payments from another user.
- **Close** to exit the wizard.

Discharging a Damaged Item

If staff identifies an item that has already been checked in but has been returned damaged, it is possible to charge the user a bill for damage. The system will provide the information of the previous user and the cost of the item.

If the damage is discovered within the *Check In* wizard and if the properties of the wizard are set to display user information, staff can identify the previous user in the wizard.

Discharging : Identify Item

Notes

Name: Bailey, Carolyn
 Id: 210000074
 Group ID:
 Profile name: STUDENT...

Identify item

Item ID:

List of discharges

Title	Item ID	Route/Transit To	Amount Billed	Amount Paid A...
The watchman :...	310000041	FIC		
I face the wind	31070000016010	STACKS		
No child left beh...	31070000034666	STACKS		
The language of...	310000214	NF		

Discharge Item (o) Clear Discharge List Close

Discharging : Identify Item

Name: Arnold, Timothy
 Id: 210000025
 Group ID:
 Profile name: ADULT...

Identify item

Item ID:

List of discharges

Title	Item ID	Route/Transit To	Amount Billed	Amount Paid A...
The watchman : ...	310000041	FIC		
I face the wind	31070000016010	STACKS		
No child left beh...	31070000034666	STACKS		
The language of...	310000214	NF		

Discharge Item (o) Clear Discharge List Close

You can locate the price of the item by clicking the *Item Search* helper and click the Current option.

Discharging : Item Search

Search for: FIC CRA
 Index: Call Number
 Library: ALL

Search

Type:
☐ Keyword
☐ Browse
☒ Exact

Current: [The watchman : a Joe Pike novel --- FIC CRA --- ID:310000041](#)

EXACT Item ID 310000041, ARROWOOD: 1 record

Title	Author	Call number
The watchman : a Joe Pike novel	Crais, Robert.	FIC CRA

Description Call Number/Item


The watchman : a Joe Pike novel
 FIC CRA - ARROWOOD
 310000041 - 1 - BOOK - F

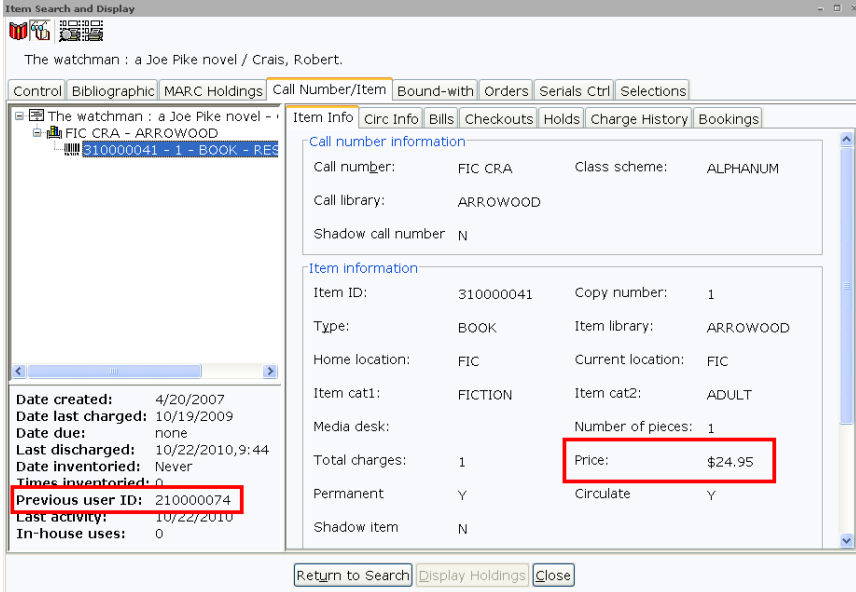
Price: \$24.95
Home location: FIC
Item category 1: FICTION
Date created: 4/20/2007
Date last charged: 10/19/2009
Last discharged: 10/22/2010,9:44
Date inventoried: Never
Times inventoried: 0
Item type: BOOK
Current location: FIC
Item category 2: ADULT
Media desk: none
Previous user ID: 210000025
Last activity: 10/22/2010,9:44
Total checkouts: 1
In-house uses: 0

Discharge Item Cancel

If the damage is discovered after the *Check In* wizard is closed or if the list of discharges has been cleared, the *Item Search and Display* wizard can be used to find the previous user ID.

To locate the previous user ID and price of the item:

1. Within the Common Tasks group of wizards, click the *Item Search and Display* wizard.  Item Search and Display
2. Scan the item's barcode or type in the item ID and click **Search**.
3. If it does not immediately display, click the **Call Number/Item** tab.
4. In this screen, look to the item Price field and the Previous User ID information at the left.



The watchman : a Joe Pike novel / Crais, Robert.

Control | Bibliographic | MARC Holdings | **Call Number/Item** | Bound-with | Orders | Serials Ctrl | Selections

Item Info | Circ Info | Bills | Checkouts | Holds | Charge History | Bookings

Call number information

Call number:	FIC CRA	Class scheme:	ALPHANUM
Call library:	ARROWOOD		
Shadow call number	N		

Item information

Item ID:	310000041	Copy number:	1
Type:	BOOK	Item library:	ARROWOOD
Home location:	FIC	Current location:	FIC
Item cat1:	FICTION	Item cat2:	ADULT
Media desk:		Number of pieces:	1
Total charges:	1	Price:	\$24.95
Permanent:	Y	Circulate:	Y
Shadow item:	N		

Date created: 4/20/2007
 Date last charged: 10/19/2009
 Date due: none
 Last discharged: 10/22/2010,9:44
 Date inventoried: Never
 Times inventoried: 0
Previous user ID: 210000074
 Last activity: 10/22/2010
 In-house uses: 0

Return to Search | Display Holdings | Close

Date created: 4/20/2007
 Date last charged: 10/19/2009
 Date due: none
 Last discharged: 10/22/2010,9:44
 Date inventoried: Never
 Times inventoried: 0
 Previous user ID: 210000074
 Last activity: 10/22/2010
 In-house uses: 0

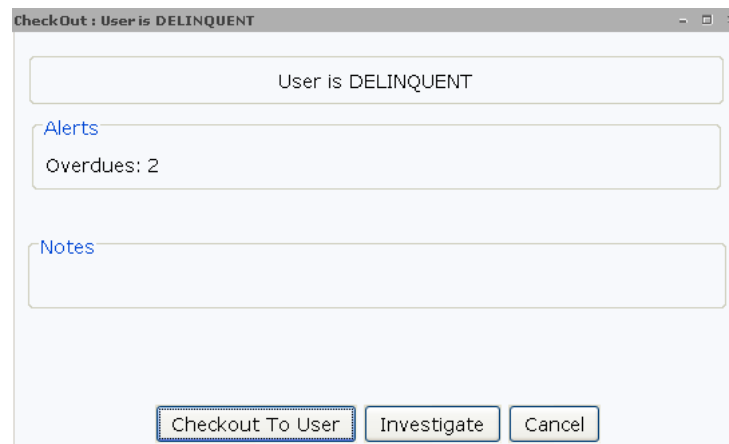
5. Click **Close** to exit the wizard.
6. At this point, you can follow the steps given above under Billing a User to create a bill for DAMAGE.

User Statuses

Every user in the system has a status. There are four user status settings:

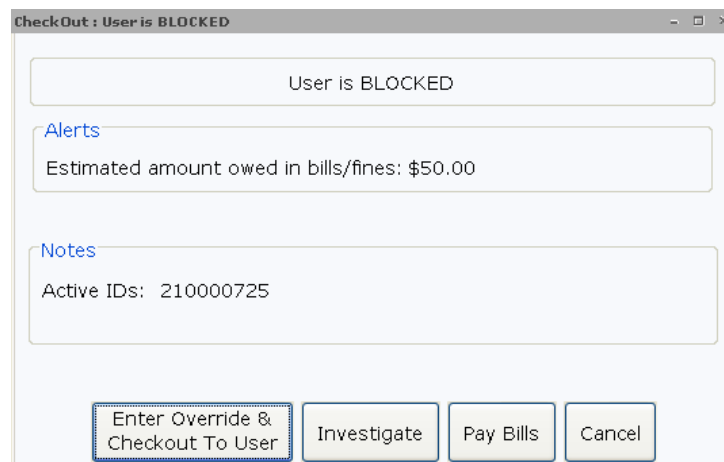
OK – User has full library privileges as defined in the policy file. The user is in good standing and has no overdue items or bills.

DELINQUENT – User has unpaid bills or overdue items under the thresholds setup in circulation policies. The user can still check out items and have all other privileges of OK users, but the workstation operator will be warned that the user is delinquent.



The screenshot shows a dialog box titled "CheckOut : User is DELINQUENT". It contains a status bar at the top that says "User is DELINQUENT". Below this is an "Alerts" section with the text "Overdues: 2". There is also a "Notes" section which is currently empty. At the bottom of the dialog, there are three buttons: "Checkout To User", "Investigate", and "Cancel".

BLOCKED – User has unpaid bills or number of overdue items over the thresholds setup in circulation policies. The user can check out items only if an override code is supplied.



The screenshot shows a dialog box titled "CheckOut : User is BLOCKED". It contains a status bar at the top that says "User is BLOCKED". Below this is an "Alerts" section with the text "Estimated amount owed in bills/fines: \$50.00". There is also a "Notes" section with the text "Active IDs: 210000725". At the bottom of the dialog, there are four buttons: "Enter Override & Checkout To User", "Investigate", "Pay Bills", and "Cancel".

BARRED – The user cannot check out items. The BARRED status must be added and removed manually by a workstation operator with assigned override code before the user can check out items.

CheckOut : Investigating BAR on Holmes, Patrick

This user is barred

Basic info

210000045

User key:	82	Privilege expires:	NEVER
Status is:	BARRED	Group ID:	
Profile name:	ADULT	Group name:	
User cat1:	MALE...	User cat2:	ENGLISH...
User cat3:		User cat4:	
User cat5:		Birth date:	NEVER
Library:	CAFEEY...	Age:	0
Language:	ENGLISH	Charge history rule:	CIRCRULE

Next allowed loan date:	Amount owed:	Credit balance:
Checkouts:	Unpaid bills:	Holds:
Extended info:	Bookings:	Routings:
Claims returned:	Orders:	Distributions:
Outreach user:		Requests/messages:

Extended info

Note: Patron has been barred for inappropriate use of public access computers.

OK



SirsiDyinx Symphony allows for the creation of custom statuses. These can be created by the system administrator.

Suspending and Unsuspending Users

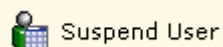
Some libraries prefer to suspend a user's loan privileges when overdue materials are returned rather than assess overdue fines. Policies can be set up to automatically suspend a user for a specific period of time when materials are returned. Staff members can use the *Suspend User* wizard to manually suspend a user's loan privileges for a specific number of days or until a selected date. This will prevent the user from checking out additional materials and placing holds, but they can still pay fines, return items, and renew items.

Once the suspension range has passed, the user will be able to resume circulation activity. Staff can also waive the suspension by a particular number of days or completely using the *Unsuspend User* wizard.

Suspend User Wizard

To suspend a user:

1. Open the Users group of wizards and click the *Suspend User* wizard.



2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.



3. Using the drop down, select a reason for the suspension.
4. In the Suspend for Number of Days field, type in the number of days to suspend the user.
5. If the suspension is associated with an item, scan the item barcode or type in the item ID. You can also use the *Item Search* helper to search for the item.

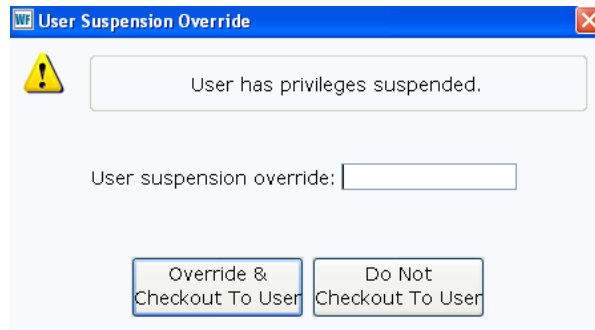
6. Click **Suspend User**.



Depending on the wizard behavior settings, you may be asked to enter a specific date rather than a number of days.

7. Click **Close**.


When staff tries to check out items to a suspended user, the following message will appear:



Unsuspend User Wizard

Using the *Unsuspend User* wizard, staff can unsuspend individual suspended users. You can do this by issuing an unsuspend suspension record for the suspension amount of an individual record or for all suspended records.

To unsuspend a user:

1. Within the Users group of wizards, click the *Unsuspend User* wizard.
 **Unsuspend User**
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

 A screenshot of the "Unsuspend User : Unsuspend User" wizard window. The window has a title bar and a menu bar with "Alerts" and "Notes". The main content area is divided into several sections:

- User Information:** Displays fields for Name (Dunn, Justin), Id (210000065), Group ID, and Profile name (ADULT...).
- Identify User:** Contains a "User ID" input field (with 210000065 entered) and a list of contact information: Street (8787 That Street), City, state (Springville, UT), Zip (87876), and Phone (666-6768).
- Enter item identification below:** Includes fields for "Next allowed loan date" (10/27/2010), "Reason for unsuspension" (a dropdown menu currently showing "FORGIVEN"), "Unsuspend for number of days" (an input field), and "Suspension key" (a dropdown menu).
- List of Suspensions and Credits:** A table with columns: Item ID, Title, Date Cr..., Suspen..., Suspen..., Linked..., Next Allowed..., Library, and Reason. It contains two rows of data:

Item ID	Title	Date Cr...	Suspen...	Suspen...	Linked...	Next Allowed...	Library	Reason
10/25/20...	Suspension 6		0			10/26/2010,8:...	ARRO...	MISC
10/25/20...	Suspension 7		0			10/27/2010,8:...	ARRO...	MISC

 At the bottom of the window are four buttons: "Get User Information", "Unsuspend User (o)", "Unsuspend Another User", and "Close".

3. Using the drop down, select a reason for unsuspension.

4. In the Unsuspend for Number of Days field, type the number of days.



Depending on the wizard behavior settings, you may be asked to enter a specific date rather than a number of days.

5. To identify a specific suspension record for this user, select a Suspension key from the drop down list.
6. Click **Unsuspend User**.
7. Click **Close**.



Working with Holds

In this section we will discuss how to place holds within WorkFlows and the online catalog. You will also learn how to modify and remove holds, as well as deal with on shelf holds, blanket holds, and recalls.

In this section you will learn to:

- Place a hold in WorkFlows
- Place a hold in the online catalog
- Display a hold
- Modify an existing hold
- Reorder a hold queue
- Trap holds for on-shelf items
- Remove a hold
- Work with a recalled item
- Place a blanket hold

When a user requests an item that is currently checked out, or when a library department needs an item for binding, mending, reclassification, or reserve collection purposes, you will need to place a hold. When you place a hold, Symphony creates a hold record that links the item and the user.

Hold records contain the following information about the item;

- User who placed the hold
- Library where the hold was placed
- Pickup library (at multi-library sites)
- Date and time the hold was placed
- Hold level and range

When more than one user places a hold on an item, Symphony creates a hold list (queue). Any number of users can wait in the hold queue.

SirsiDynix Symphony uses information in hold records, hold policies, item policies, and user profile policies to determine which user in the hold queue receives the item when it becomes available.

A hold can also be a recall. That is, the patron who has the item checked out must return the item before the original due date.

Placing Holds


Place Hold Wizard

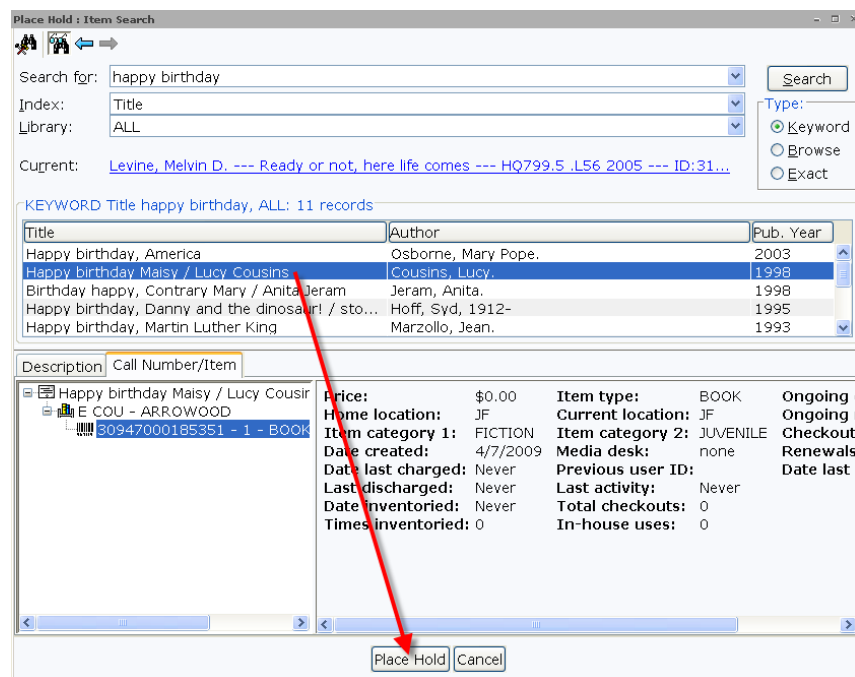
The *Place Hold* wizard allows staff to place holds on library materials.



If you try to place holds for a user with a **BLOCKED** status, you can determine the reason for the status and take actions to resolve the user's blocked status (if desired). You can then continue with the Place Hold process. For more information see the WorkFlows online Help file "FAQs: Placing Holds."

To place a hold in WorkFlows:

1. Open the Holds group of wizards and click the *Place Hold* wizard.
 Place Hold
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. If you do not have an item ID, click the *Item Search* helper and search for the item. If more than one title appears in the list, highlight the relevant title and click **Place Hold**.



Title	Author	Pub. Year
Happy birthday, America	Osborne, Mary Pope.	2003
Happy birthday Maisy / Lucy Cousins	Cousins, Lucy.	1998
Birthday happy, Contrary Mary / Anita Jeram	Jeram, Anita.	1998
Happy birthday, Danny and the dinosaur! / sto...	Hoff, Syd, 1912-	1995
Happy birthday, Martin Luther King	Marzollo, Jean.	1993

Description	Call Number/Item
Happy birthday Maisy / Lucy Cousins	80947000185351 - 1 - BOOK

Price:	Item type:	Ongoing
\$0.00	BOOK	Ongoing
Home location: JF	Current location: JF	Ongoing
Item category 1: FICTION	Item category 2: JUVENILE	Checkout
Date created: 4/7/2009	Media desk: none	Renewals
Date last charged: Never	Previous user ID:	Date last
Last discharged: Never	Last activity: Never	
Date inventoried: Never	Total checkouts: 0	
Times inventoried: 0	In-house uses: 0	

Place Hold Cancel

4. If necessary, change the pickup location with the Pickup At drop down.

5. If necessary, type in any important information regarding the hold being placed. This information will appear when viewing the hold record, and at check-in.
6. If the user is going on vacation and they want to prevent the hold from being filled for a specific period of time, use the *Date Suspend* to select the effective date. Use the *Date Unsuspended* gadget to select the date the user wants to be “restored” in the hold queue. During the suspension, the user will not lose his place in the queue.
7. To make the hold first in the queue, click the box next to Make Hold First in Queue. This may not display depending on the wizard behavior properties.
8. If the Reserve Hold check box displays and you select this box, the hold can be filled with a reserve item or a non-reserve item. If you clear this check box, the hold cannot be filled with a reserve item. The Reserve Hold check box displays only if the wizard behavior properties for this option is selected by the system administrator.

Place Hold

Notes

Name: Lambert, Sonia
Id: 210000091
Group ID:
Profile name: ADULT...

Happy birthday Maisy / Lucy Cousins / Cousins, Lucy.
E.COU Copy:1 ID:30947000185351

Identify User

User ID: 210000091

Street: 3700, place des Grands Magasins
City, state: Montréal, QC
Zip: J4Z 3P2
Phone: 450-345-6789

Identify Item

Item ID: 30947000185351

Hold Info

Pickup at: ARROWOOD Expires: 4/23/2011
Comments:
Date suspended: Date unsuspended:

Level/Range

Level: ☐ Copy ☒ Title
Range: ☐ Library ☐ Group ☒ System

Recall status

☐ Allow Recall ☒ No Recall ☐ Recall now (RUSH)

☐ Make hold first in queue ☐ Reserve hold

Get User Information Get Item Information (b) **Place Hold** Place Hold for Another User (g) Close

9. Click **Place Hold**.
10. After the hold has been placed, select one of the following options:
 - **Place Hold for Another User** to place a hold for another user.

- **Place Another Hold for This User** to place another hold for this user.
- **Remove This Hold** to remove the hold you just placed.
- **Modify This Hold** to make changes to this hold.
- **Close** to exit the wizard.

Record Ranges

You can place holds across a collection of item records. This collection of item records is called a record range. There are three types of record ranges: System, Group, and Library.

The range only applies to Title level holds. Range types are not used on Copy level holds because a Copy level hold is placed on a specific copy of a title.

System Range – The System range applies the Title level hold across all copies in the system that are eligible to fill the hold. If no qualified copies exist for the title, WorkFlows prompts you for an override code to place the hold on copies that would otherwise be considered ineligible.

Group Range – The Group range applies a Title level hold across all libraries listed in an attribute of the station operator's Library policy. Systems may group libraries by library type (academic, school, public, etc.) or by region. The hold is satisfied by a copy from the group of libraries to which login's station library belongs.

Library Range – The Library range applies a Title level hold on copies available in the item's library.

Placing a Hold in the Online Catalog

Users can place holds on items using any of the available SirsiDynix online catalogs.

To place a hold in e-Library:

1. Enter your search terms and, if necessary, change the type of search (title, author, etc.) and library. Click **Search**.

2. If you receive a hit list, click on the title you wish to place on hold.

Search Results



Depending on configuration of the online catalog, the Place Hold option may appear in the hit list.

3. Within the Item Details, click **Place Hold**.



Item Details

☐ Keep



[Place Hold](#)

[Buy now](#)

[Find more by this author](#)

[Find more on these topics](#)

[Nearby items on shelf](#)

Item Information [A Look Inside](#) [Catalog Record](#)

Title Dark river
Author Hunter, Erin.
Publisher: HarperCollinsPublishers,
Pub date: c2008.
Pages: 320, 12 p. :
ISBN: 9780060892050
Item info: 1 copy available at E. A. Arrowood Foundation Library.



The dazzling new story arc in Hunters #1 nationally bestselling Warriors series continues as Hollypaw, Jaypaw, and Lionpaw--the three cats who, according to prophecy, hold the future of the Clans--train as apprentices.

	Holdings	Copies	Material	Location
E. A. Arrowood Foundation Library	JF HUN	1	Book	Non-fiction Shelves
All content				

4. If you have not already logged in, enter your User ID and PIN.

Place Hold

Title: Dark river / Erin Hunter.

Author: Hunter, Erin.

User ID: or

Alternate ID:

PIN:

Mail item to me: ☐

Pickup at:

Delivery Method:

Expiration date:

Suspension start date: Suspension end date:

[Place Hold](#)

[Reset Query Values](#)

[Cancel](#)

5. If necessary, change the Pickup library or add a suspension start and end date.
6. Click **Place Hold**.
7. Click **OK** to the confirmation message.



Results of Hold Request(s)

Lambert, Sonia
User ID:210000091

Hold(s) Placed

Dark river
Hunter, Erin.
JF HUN
Pickup at: Patrick Caffey Public Library

Expiration date: Apr 23, 2011

OK


Placing a Recall Hold

Some libraries –particularly academic libraries –will issue recalls on checked out material. A recall requests the return of the item(s) before their due date.



For libraries that do not allow recall holds to be placed, the properties of the wizard can be configured to remove the Recall Status area of the *Place Hold* wizard.

To place a recall hold:

1. Open the Holds group of wizards and click the *Place Hold* wizard.
 Place Hold
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. If you do not have an item ID, click the *Item Search* helper and search for the item. If more than one title appears in the list, highlight it in the list and click **Place Hold**.
4. Click Copy for the Level.



Place Hold

Notes

Name: Lambert, Sonia
 Id: 210000091
 Group ID:
 Profile name: ADULT...

Standardized childhood : the political and cultural struggle over early educ... / Fuller, Bruce.
 372.21.FUL... Copy:1 ID:310000368

Identify User

User ID: 210000091

Street: 3700, place des Grands Magasins
 City, state: Montréal, QC
 Zip: J4Z 3P2
 Phone: 450-345-6789

Identify Item

Item ID: 310000368

Hold Info

Pickup at: ARROWOOD Expires: 4/23/2011
 Comments:
 Date suspended: Date unsuspended:

Level/Range

Level: ☒ Copy ☐ Title
 Range: ☐ Library ☐ Group ☒ System

Recall status

☐ Allow Recall ☐ No Recall ☒ Recall now (RUSH)

☐ Make hold first in queue ☐ Reserve hold

Get User Information Get Item Information (b) Place Hold Place Hold for Another User (g) Close

5. Select either Allow Recall or Recall Now (RUSH).

Allow Recall specifies that if the current user has had the item at least as long as the recall loan period specifies, even if the item is not due yet, the item can be recalled.

Recall Now (RUSH) specifies that the current user's charge due date is to be changed to the current date.




If recalls are placed on materials, you will want to schedule the Recall Notice report to run periodically. The report generates notices requesting the return of charged items.

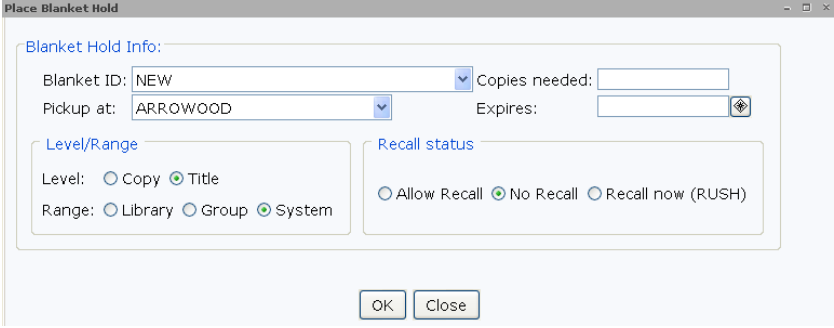
Placing a Blanket Hold

The *Place Blanket Hold* wizard can be used to place a single hold on multiple titles or items. It requires a specified number of items be available before the hold is considered filled.

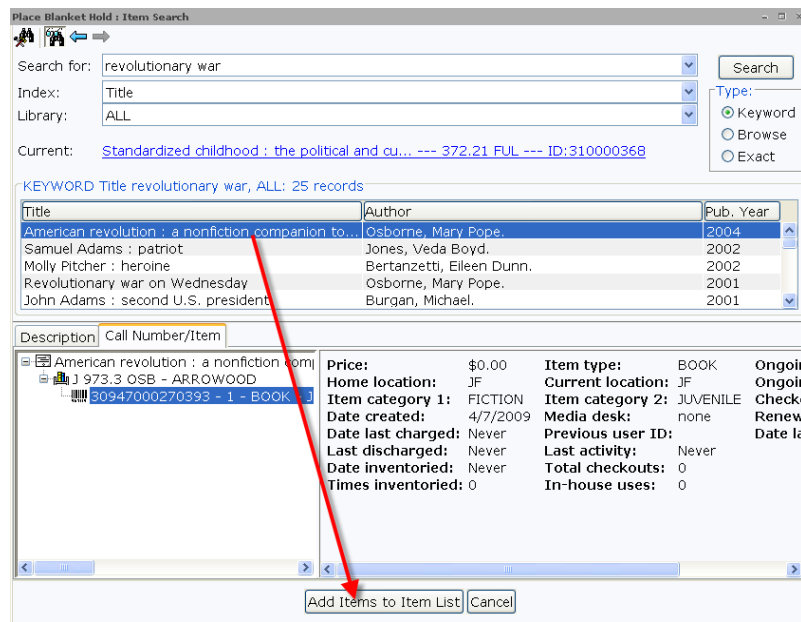
This wizard is particularly useful to place a hold on a title available in different formats (book, paperback, large print, book on CD, etc.). It can also be used to place holds on items of a particular subject. For example, if a student needs to write a paper on the 'Renaissance art' and he needs five sources on the subject, staff can place holds on a range of titles. If staff places a blanket hold on 10 different titles, the first five titles that become available will fill the hold. The other five titles holds will be removed automatically.

To place a blanket hold:

1. Within the Holds group of wizards, click the *Place Blanket Hold* wizard.  Place Blanket Hold
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.



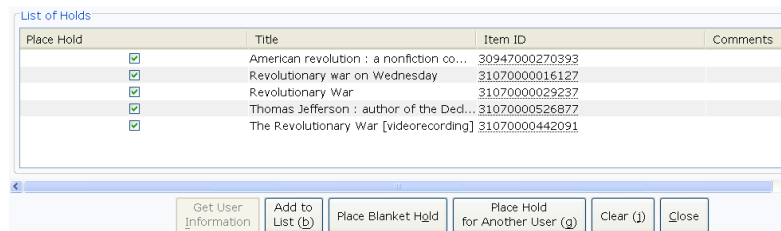
3. In the Copies Needed field, type the number of items (1 to 50) that must be available for the blanket hold to be considered filled.
4. If necessary, change the pickup library using the Pickup At drop down.
5. Click on the *Expires* gadget and select an expiration date for the blanket hold. This is a required field.
6. Make any other necessary selections and click **OK**.
7. Click the *Item Search* helper and search for the title or subject to be placed on hold.
8. Highlight a title and click **Add Items to Item List**.



9. Click **Add to List**.

A list will begin to form at the bottom of the Place Blanket Hold screen.

10. Click the *Item Search* helper again and select another title and repeat steps 8 and 9 to add more titles to the list.



11. Click **Place Blanket Hold**.

12. A confirmation screen will appear letting you know how many blanket holds were placed.

13. Click **Close**.

Below is how a blanket hold appears on a user's record:

Holds										
Total holds:4										
Blanket ID	Title	Item ID	Level	Status	Placed	Pickup at	Pickup by	Expires	Suspen...	Unusp...
Dark river	310000737	TITLE	(unavalla...	10/25/2010	CAFFEY			4/23/2011		
Mr. Monk ...	310001172	TITLE	(unavalla...	10/25/2010	CAFFEY			4/23/2011		
Standardl...	310000368	COPY	(unavalla...	10/25/2010	ARROWO...			4/23/2011		
HOLD-8										
American ...	3094700...	TITLE	(unavalla...	10/25/2010	ARROWO...			11/30/2010		
Revolutio...	3107000...	TITLE	(unavalla...	10/25/2010	ARROWO...			11/30/2010		
Revoluto...	3107000...	TITLE	(unavalla...	10/25/2010	ARROWO...			11/30/2010		
Thomas J...	3107000...	TITLE	(unavalla...	10/25/2010	ARROWO...			11/30/2010		
The Revol...	3107000...	TITLE	(unavalla...	10/25/2010	ARROWO...			11/30/2010		


Displaying Hold Information

Staff can view hold records with different wizards within WorkFlows.

Display User Holds Wizard

The *Display User Holds* wizard is used to display all holds placed by a specific user.

To display holds for a user:

1. Within the Holds group of wizards, click the *Display User Holds* wizard.  Display User Holds
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

Notes

Name: Lambert, Sonia
Id: 210000091
Group ID:
Profile name: ADULT...

Identify user

User ID:

Street: 3700, place des Grands Magasins
City, state: Montréal, QC
Zip: J4Z 3P2
Phone: 450-345-6789

Holds

Total holds:5

Blanket...	Title	Item ID	Level	Status	Placed	Pickup at	Pickup ...	Expires	Suspe...	Unsus...	Mail se...
Dark river	310000...	TITLE	(unavall...	10/25/2...	CAFFEY			4/23/20...			
Mr. Mon...	310001...	TITLE	(unavall...	10/25/2...	CAFFEY			4/23/20...			
Standar...	310000...	COPY	(unavall...	10/25/2...	ARROW...			4/23/20...			
Puff, th...	310000...	TITLE	(unavall...	10/26/2...	ARROW...			4/24/20...			
HOLD-8											
America...	309470...	TITLE	(unavall...	10/25/2...	ARROW...			11/30/2...			
Revoluti...	310700...	TITLE	(unavall...	10/25/2...	ARROW...			11/30/2...			
Revoluti...	310700...	TITLE	(unavall...	10/25/2...	ARROW...			11/30/2...			
Thomas...	310700...	TITLE	(unavall...	10/25/2...	ARROW...			11/30/2...			

Display This User's Holds

Display Another User's Holds

Close

3. Click the glossary links within the list of holds to display more detailed information.
4. Click **Close** to exit the wizard.




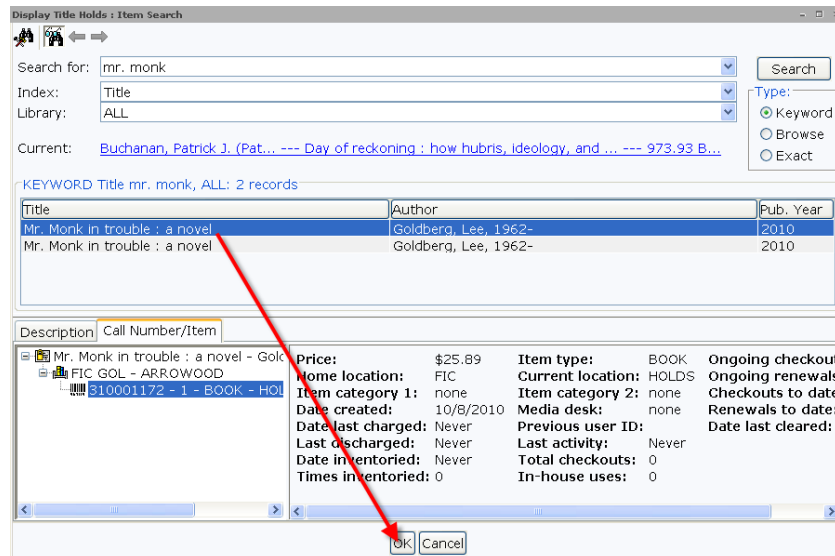
The same information can be viewed using the *Display User wizard*.

Display Title Holds Wizard

The *Display Title Holds* wizard lists and summarizes all Title level holds placed on a title. This allows staff to see various hold counts and item counts to help determine how many Title level holds of various ranges are on a title, as well as how many items attached to a title can be used to fill holds.

To display title level holds:

1. Within the Holds group of wizards, click the *Display Title Holds* wizard.  Display Title Holds
2. Search for the title you want to display. If you receive a hit list, highlight the title you want to view and click **OK**.



Display Title Holds : Item Search

Search for: mr. monk

Index: Title

Library: ALL

Current: Buchanan, Patrick J. (Pat... --- Day of reckoning : how hubris, ideology, and ... --- 973.93 B...

KEYWORD Title mr. monk, ALL: 2 records

Title	Author	Pub. Year
Mr. Monk in trouble : a novel	Goldberg, Lee, 1962-	2010
Mr. Monk in trouble : a novel	Goldberg, Lee, 1962-	2010

Description Call Number/Item

Mr. Monk in trouble : a novel - Goldberg, Lee, 1962-
FIC GOL - ARROWOOD
310001172 - 1 - BOOK - HOL

Price: \$25.89

Item type: BOOK

Item location: FIC

Current location: HOLDS

Item category 1: none

Item category 2: none

Date created: 10/8/2010

Media desk: none

Date last charged: Never

Previous user ID: None

Last discharged: Never

Last activity: Never

Date inventoried: Never

Total checkouts: 0

Times inventoried: 0

In-house uses: 0

Ongoing checkout

Ongoing renewals

Checkouts to date

Renewals to date:

Date last cleared:

OK Cancel


3. Click the glossary links within the list of holds to display more detailed information.
4. Click **Close**.

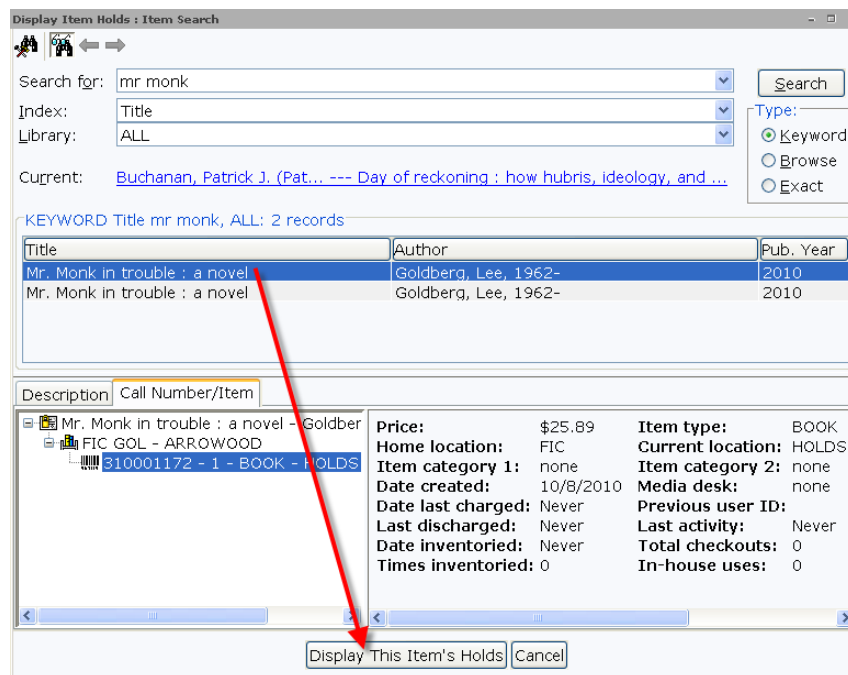


Display Item Holds Wizard

Staff can use the *Display Item Holds* wizard to display a list of holds placed on a specific item.

To display item holds:

1. Within the Holds group of wizards, click the *Display Item Holds* wizard.  Display Item Holds wizard.
2. Search for the title you want to display. If you receive a hit list, highlight the title you want to view and click **Display This Item's Holds**.



Title	Author	Pub. Year
Mr. Monk in trouble : a novel	Goldberg, Lee, 1962-	2010
Mr. Monk in trouble : a novel	Goldberg, Lee, 1962-	2010

Description	Call Number/Item
Mr. Monk in trouble : a novel - Goldber	
FIC GOL - ARROWOOD	
310001172 - 1 - BOOK - HOLDS	

Price:	\$25.89	Item type:	BOOK
Home location:	FIC	Current location:	HOLDS
Item category 1:	none	Item category 2:	none
Date created:	10/8/2010	Media desk:	none
Date last charged:	Never	Previous user ID:	
Last discharged:	Never	Last activity:	Never
Date inventoried:	Never	Total checkouts:	0
Times inventoried:	0	In-house uses:	0

Display This Item's Holds Cancel

3. Click the glossary links within the list of holds to display more detailed information. These glossaries will display the user's position within the holds queue.

User name:	Arnold, Timothy	
User ID:	210000025	
Placed at library:	ARROWOOD.	
Pickup library:	ARROWOOD.	
Position:	3	
Hold placed:	10/25/2010	Expires: 4/23/2011
No hold allowed override:	N	
Level:	TITLE	NO recall
Range:	SYSTEM	
Status:	(unavailable)	Notified:
Comment:		

Close

4. Click **Close** to close the glossary.
5. Click **Close** again to exit the wizard.


Modifying Holds

The *Modify Holds for User* and *Modify Holds for Items* wizards allow you to change the following information about a user's hold:

- Pickup library
- Expiration date
- Comment
- Recall status
- Date suspended/unsuspended

Modify Holds for User Wizard

To modify a user's hold:

1. Within the Holds group of wizards, click the *Modify Holds for User* wizard.  Modify Holds for User
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

3. To modify all of the user's holds, click the Select All check box. To modify selected holds, select the Modify check box next to each hold you want to modify.

Notes

Name: Lambert, Sonia
Id: 210000091
Group ID:
Profile name: ADULT...

Identify User

User ID: 210000091

Street: 3700, place des Grands Magasins
City, state: Montréal, QC
Zip: J4Z 3P2
Phone: 450-345-6789

List of Holds

☐ Select All

Modif...	Title	Recall	Picku...	Picku...	Expires	Status	Com...	Reco...	Susp...	Uns...	Mail ...
<input checked="" type="checkbox"/>	Happy...	NO	ARRO...		4/23/2011	(unav...			NEVER	NEVER	
<input type="checkbox"/>	Dark ri...	NO	CAFHEY		4/23/2011	(unav...			NEVER	NEVER	
<input checked="" type="checkbox"/>	Mr. Mo...	NO	ARRO...		4/23/2011	(unav...			NEVER	NEVER	

Get User Information Modify Modify Another User's Holds (b) Close

4. Click **Modify**.

Modify Holds Fields

☐ Allow Recall ☐ No Recall ☐ Recall now (RUSH)

Pickup at: [dropdown] Expires: [date picker]

Date suspended: [date picker] Date unsuspended: [date picker]

Mail Item to User: ☐ Yes ☐ No Mail service: [dropdown]

Comment: ☐ Append ☐ Replace ☐ Remove


OK Cancel

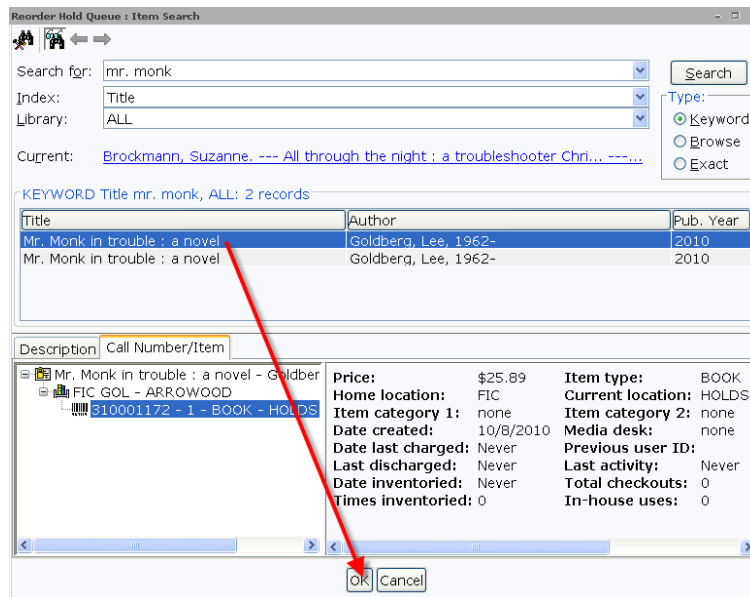
5. Make the necessary changes such as the pickup library or suspension dates.
6. Click **OK**.
7. Click **Close**.

Reorder Hold Queue Wizard

The *Reorder Hold Queue* wizard will allow staff to move a hold or group of holds up or down in the queue.

To reorder the hold queue:

1. Within the Holds group of wizards, click the *Reorder Hold Queue* wizard.  Reorder Hold Queue wizard.
2. Search for the title you want to reorder the hold queue. If you receive a hit list, highlight the title you want to view and click **OK**.



Reorder Hold Queue : Item Search

Search for: mr. monk

Index: Title

Library: ALL

Current: Brockmann, Suzanne. --- All through the night : a troubleshooter Chri... ---...

Type: ☒ Keyword ☐ Browse ☐ Exact

KEYWORD Title mr. monk, ALL: 2 records

Title	Author	Pub. Year
Mr. Monk in trouble : a novel	Goldberg, Lee, 1962-	2010
Mr. Monk in trouble : a novel	Goldberg, Lee, 1962-	2010

Description Call Number/Item

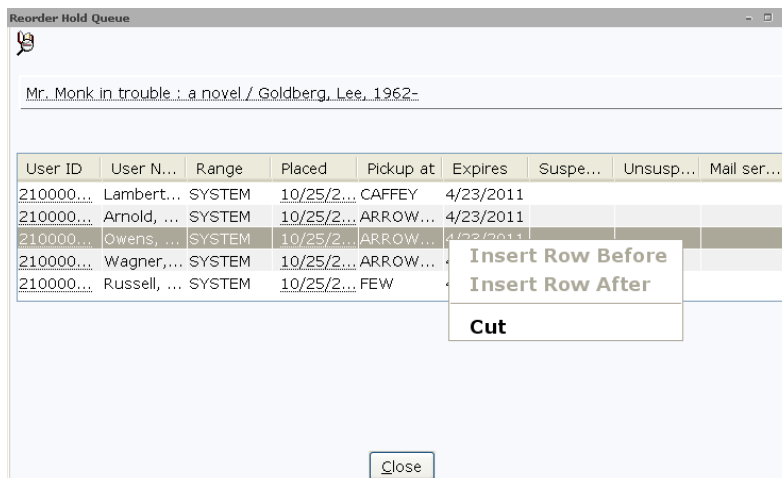
Mr. Monk in trouble : a novel - Goldber
FIC GOL - ARROWOOD
S10001172 - 1 - BOOK - HOLDS

Price: \$25.89
Home location: FIC
Item category 1: none
Date created: 10/8/2010
Date last charged: Never
Last discharged: Never
Date inventoried: Never
Times inventoried: 0

Item type: BOOK
Current location: HOLDS
Item category 2: none
Media desk: none
Previous user ID:
Last activity: Never
Total checkouts: 0
In-house uses: 0

OK Cancel

3. Highlight the hold line(s) by clicking the line (and dragging the cursor down or up to select multiple lines), right-click, and select **Cut**.



Reorder Hold Queue

Mr. Monk in trouble : a novel / Goldberg, Lee, 1962-

User ID	User N...	Range	Placed	Pickup at	Expires	Suspe...	Unsuspe...	Mail ser...
210000...	Lambert...	SYSTEM	10/25/2...	CAFFEY	4/23/2011			
210000...	Arnold, ...	SYSTEM	10/25/2...	ARROW...	4/23/2011			
210000...	Owens, ...	SYSTEM	10/25/2...	ARROW...	4/23/2011			
210000...	Wagner,...	SYSTEM	10/25/2...	ARROW...				
210000...	Russell, ...	SYSTEM	10/25/2...	FEW				

Insert Row Before
Insert Row After
Cut

Close

4. Highlight the hold line where you want to insert the hold(s), right-click, and select **Insert Before** or **Insert After**.

Insert Row Before

Insert Row After

Cut

5. After reordering the hold queue, click **Close**.

Working with Onshelf Holds

If your library permits holds on materials on the shelf, staff can either use the List Onshelf Items with Holds report or the *Onshelf Items* wizard.

List Onshelf Items with Holds Report

This report produces a list of items qualified to satisfy a hold and are available for pickup somewhere in the library system.

Below is a sample of the report:

```
HOLD PICKUP LIST

Produced Mon Oct 25 12:36:20 2010

Library: ARROWOOD

973.931 MOR
Morris, Dick
Outrage : how illegal immigration, the United Nations, Congressional r
  copy:1      item ID:310000437      type:BOOK      location:FIC
user ID:210000054      user name:Russell, Amy
Pickup library:CAFEEY      Date of discharge:NEVER

FIC BAL
Baldacci, David
Stone cold / David Baldacci
  copy:1      item ID:310000570      type:BOOK      location:FIC
user ID:210000040      user name:Wagner, Deborah
Pickup library:ARROWOOD      Date of discharge:NEVER

FIC BRO
Brockmann, Suzanne
Force of nature : a novel / Suzanne Brockmann
  copy:1      item ID:310000524      type:BOOK      location:FIC
user ID:210000040      user name:Wagner, Deborah
Pickup library:ARROWOOD      Date of discharge:NEVER

FIC KIN
King, Stephen, 1947-
Hearts in Atlantis / Stephen King
  copy:1      item ID:310000403      type:BOOK      location:FIC
user ID:210000773      user name:Bailey, Stephanie
Pickup library:ARROWOOD      Date of discharge:NEVER
```

Once items are collected using the report output, staff will scan the items within the *Trap Holds* wizard.



Transit and hold slips can be configured by the system administrator to print automatically. Hold wrappers can also be set up to print.

Onshelf Items Wizard

The *Onshelf Items* wizard is used to display items on the shelf in your library wanted for holds. Rather than viewing the output of the List Onshelf Items with Holds report from the finished report list or emailing the output to individual users, you can view the output from a single wizard on the Circulation toolbar.

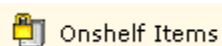
By default, the wizard will display a list of holds wanted from the station login library.

For the station library only, you can select an item in the list and perform the following:

- Trap the selected hold.
- Mark the selected item as missing.
- “Unfill” a hold.

To display the onshelf hold items list:

1. Within the Holds group of wizards, click the *Onshelf Items* wizard.



Onshelf Items

On shelf: 19

Onshelf Hold Items: ARROWOOD

Call Number >	Title	Item ID	Item type	Current location	Date/Time Dis...	Pickup Library
331.8 LEW	Democratic acc...	310000264	BOOK	NF		NEVER ARROWOOD
339.46 KAR	The persistence...	310000629	BOOK	NF		NEVER ARROWOOD
361.7 CLI	Giving : how ea...	310000611	BOOK	NF		NEVER ARROWOOD
613.25 ROI	You, on a diet :...	310000083	BOOK	NF		NEVER ARROWOOD
613.25 TRU	The weight loss...	310000084	BOOK	NF		NEVER ARROWOOD
796.620 LAN	Positively false ...	310000460	BOOK	NF		NEVER ARROWOOD
973.931 MOR	Outrage : how l...	310000437	BOOK	FIC		NEVER CAFFEY
ART	The adoration ...	3100088234	ART	STACKS		NEVER ARROWOOD
E COU	Happy birthday...	30947000185351	BOOK	JF		NEVER CAFFEY
E LUM	Princesses are ...	30947000225447	BOOK	JF		NEVER CAFFEY
E WAL	Are we there ye...	30947000193140	BOOK	JF		NEVER CAFFEY
FIC BAL	Stone cold	310000570	BOOK	FIC		NEVER ARROWOOD
FIC BRO	Force of nature...	310000524	BOOK	FIC		NEVER ARROWOOD
FIC KIN	The dark tower	310000387	BOOK	FIC		NEVER ARROWOOD
FIC KIN	Hearts in Atlantis	310000403	BOOK	FIC		NEVER ARROWOOD
FIC MIL	The senator's ...	310000730	BOOK	FIC		NEVER ARROWOOD
JF HUN	Dark river	310000737	BOOK	NF		NEVER CAFFEY
NEWT JUV PZ7 ...	Harry Potter an...	31070000417747	BOOK	STACKS	10/6/2009,2:28	MOYERS
QP26.F68 M33 ...	Rosalind Frankli...	31070000537122	BOOK	STACKS		NEVER ARROWOOD

- To print the list of titles, click **Print**.
- Once the materials have been collected from the shelf, to trap a hold, highlight the title and click **Trap Hold for Selected Copy**.



You can also right-click on the title and view a menu of options.

- Click **Make Hold Available** or **Put Item in Transit** if the item needs to be routed to a different library.



Transit and hold slips can be configured by the System administrator to print automatically. Hold wrappers can also be set up to print.

- If you cannot locate an item on the list, you could mark it missing; highlight the title and click **Mark Item Missing**.
- Click **OK**.
- If you do not want an item to fill a hold, highlight the item and click **Unfill Hold**.
- Click **OK**.
- Once you have finished working with the list, click **Close**.



It is important that the List Onshelf Items with Holds report is run once each night before using the wizard during the day. This is needed to catch any holds that automatically become suspended or unsuspended by the system, or to update the holditem

database for any library “closed days” parameters.




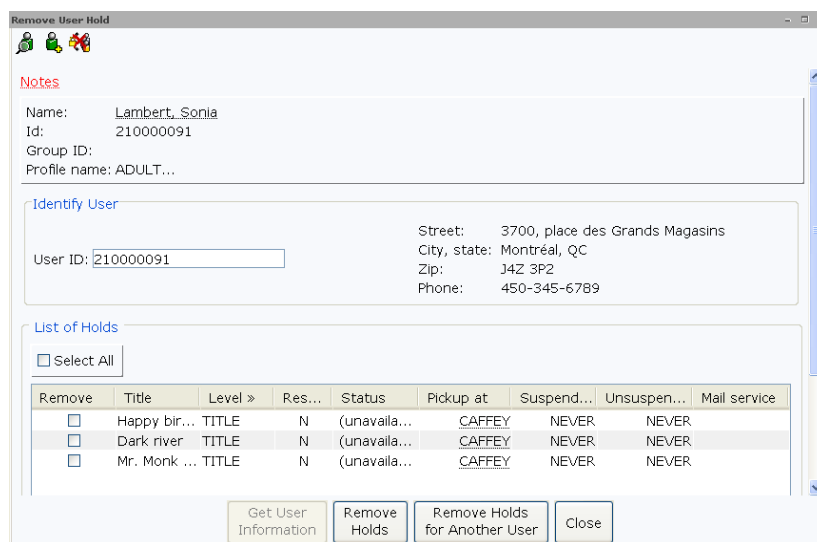
To read more about this wizard and its functionality, refer to the SirsiDynix Symphony online Help topic “Onshelf Items Wizard.”

Removing a Hold

If a user no longer needs an item, staff can remove the hold using either the *Remove User Hold* wizard or the *Remove Item Hold* wizard.

To remove a user’s hold:

1. Within the Holds group of wizards, click the *Remove User Hold* wizard.  Remove User Hold
2. Scan the user’s barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.



Remove	Title	Level »	Res...	Status	Pickup at	Suspend...	Unsuspen...	Mail service
<input type="checkbox"/>	Happy bir...	TITLE	N	(unavalla...	CAFEEY	NEVER	NEVER	
<input type="checkbox"/>	Dark river	TITLE	N	(unavalla...	CAFEEY	NEVER	NEVER	
<input type="checkbox"/>	Mr. Monk ...	TITLE	N	(unavalla...	CAFEEY	NEVER	NEVER	

3. To remove all of the user’s holds, click the Select All check box. To remove selected holds, select the Remove check box next to each hold you want to modify.
4. Click **Remove Holds**.
5. A list of removed holds will appear. Click **Close**.
6. Click **Close**.

The *Remove Item Holds* wizard might best be used when staff needs to remove the holds of the last copy of a title that has gone missing, has been damaged beyond repair, or is lost. This wizard will remove all of the holds on the title.

Remove Item Hold

Mr. Monk in trouble : a novel / Goldberg, Lee, 1962-
FIC GOL Copy: 1 ID:310001172

Identify item
Item ID: 310001172

List of Holds
☒ Select All

Remove	User ID	User N...	Level	Reserve	Status	Pickup at	Suspe...	Unsus...	Mail se...
<input checked="" type="checkbox"/>	210000...	Trembla...	TITLE	N	(availab...	ARROW...	NEVER	NEVER	
<input checked="" type="checkbox"/>	210000...	Lambert...	TITLE	N	(unavai...	CAFFEY	NEVER	NEVER	
<input checked="" type="checkbox"/>	210000...	Arnold, ...	TITLE	N	(unavai...	ARROW...	NEVER	NEVER	
<input checked="" type="checkbox"/>	210000...	Owens, ...	TITLE	N	(unavai...	ARROW...	NEVER	NEVER	
<input checked="" type="checkbox"/>	210000...	Wagner...	TITLE	N	(unavai...	ARROW...	NEVER	NEVER	
<input checked="" type="checkbox"/>	210000...	Russell, ...	TITLE	N	(unavai...	FEW	NEVER	NEVER	

Get Item Information

Remove Holds

Remove Holds for Another Item

Close

A report can be run to notify users regarding the removal of a hold.

Working with Items

In this chapter, we introduce you to tasks related to items. This includes adding brief titles and items, editing item records and marking items lost, missing or claimed returned.

In this section you will learn to:

- Create a brief record to circulate
- Change an Item ID
- Mark an item missing
- Mark an item lost
- Mark an item with a claims returned date

Overview

Each item in your bibliographic database must have a unique identifier called the Item ID. Each item must also be assigned an item type. The item type assigned to each item determines certain characteristics, such as how the item circulates to different users.

In addition, each item must have a home location and a current location. The home location is the permanent location – where the item is supposed to be when not circulating. The current location shows where the item is as a result of circulation activity. This can be considered the “status” of an item. Symphony updates the current location when items are checked out, checked in, put on hold, put in transit, marked missing or lost, or discarded.

There are optional item statistical fields to categorize items in the item record. These might be used to note a funding source, a reading level, fiction/nonfiction category, or an academic department. Other fields indicate permanence, circulation permission, and price. Symphony maintains other item fields including:

- Date the item was created
- ID of the user who last checked out the item
- Date the item last circulated
- Total number of charges (checkouts)
- Total in-house use
- Date inventoried and the number of times inventoried

Creating a Brief Record


The *Add Brief Title* wizard creates a brief record when you need to circulate an item that has not been fully cataloged. When checked in, WorkFlows retains the record. It can be routed to be fully cataloged or it can be removed. You can also use this wizard to enter interlibrary loan items into the catalog.

A brief title is shadowed from the public. Only staff can see a brief title in WorkFlows.

This wizard is available as a helper in the *Checkout* wizard and can be used in the same manner as discussed here.



To add a brief title:

1. Open the Items group of wizards and click on the *Add Brief Title* wizard.  Add Brief Title
2. Highlight ****REQUIRED FIELD**** and enter the title.
3. Verify the Item Type and Home Location.
4. If you do not want to use the auto-generated item ID, scan the barcode into the field or type the item ID.

A screenshot of the 'Add Brief Title' wizard form. The form has two main sections: 'Title info' and 'Call number and copy info'. In the 'Title info' section, the 'Title' field is highlighted with a red box and contains the text '**REQUIRED FIELD**'. In the 'Call number and copy info' section, the 'Item ID' field contains the value '97165-1001'. A red arrow points from a red-bordered text box to the 'Item ID' field. The text box contains the text 'Use the system auto-generated item ID or scan in your own barcode'. At the bottom of the form, there are four buttons: 'Add Brief Title (o)', 'Modify', 'Add Another Title', and 'Close'.


5. Click **Add Brief Title**.

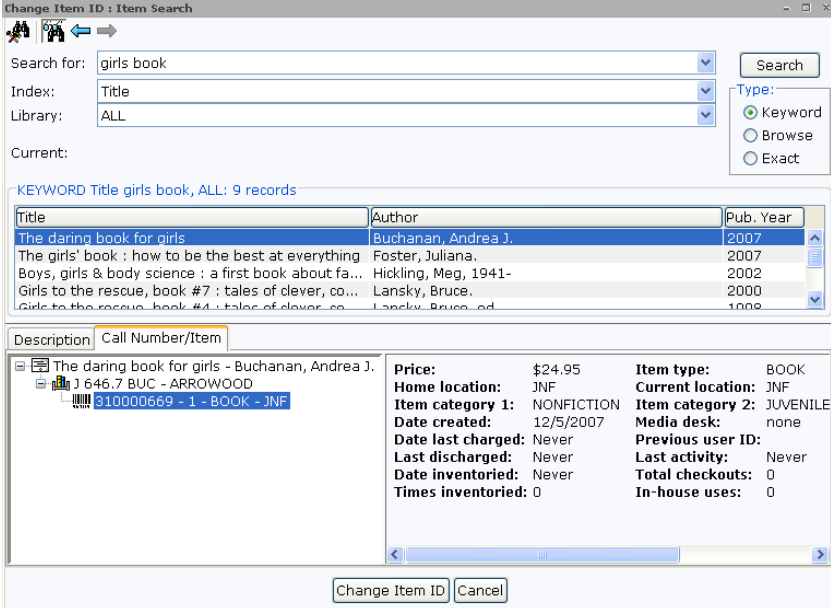
6. After the record has been created, select one of the following options:
 - **Add Another Brief Title** to create another brief title.
 - **Make More Changes** to modify the brief title information.
 - **Close** to exit the wizard.

Changing an Item ID

The *Change Item ID* wizard allows circulation staff to assign a new barcode to an item that has an unreadable or missing barcode. This wizard gives access to the barcode field only, protecting the bibliographic record from any modification.

To change an item ID:

1. Within the Items group of wizards, click the *Change Item ID* wizard.
 **Change Item ID**
2. Search for the item you want to change. If you receive a hit list, highlight the title you want to view and click **Change Item ID**.



Change Item ID : Item Search

Search for: girls book Search

Index: Title Type: ☒ Keyword ☐ Browse ☐ Exact

Library: ALL

Current:

KEYWORD Title girls book, ALL: 9 records

Title	Author	Pub. Year
The daring book for girls	Buchanan, Andrea J.	2007
The girls' book : how to be the best at everything	Foster, Juliana.	2007
Boys, girls & body science : a first book about fa...	Hickling, Meg, 1941-	2002
Girls to the rescue, book #7 : tales of clever, co...	Lansky, Bruce.	2000
Girls to the rescue, book #4 : tales of clever, co...	Lansky, Bruce.	1998

Description Call Number/Item

The daring book for girls - Buchanan, Andrea J.
 J 646.7 BUC - ARROWOOD
 810000669 - 1 - BOOK - JNF

Price:	\$24.95	Item type:	BOOK
Home location:	JNF	Current location:	JNF
Item category 1:	NONFICTION	Item category 2:	JUVENILE
Date created:	12/5/2007	Media desk:	none
Date last charged:	Never	Previous user ID:	
Last discharged:	Never	Last activity:	Never
Date inventoried:	Never	Total checkouts:	0
Times inventoried:	0	In-house uses:	0

Change Item ID Cancel

3. In the New Item ID field, scan or type the new item's barcode and click **Modify**.

All of the item's information transfers over to the new barcode such as previous user ID and total checkouts for the item.

4. Click **Close** to exit the wizard.




You can also perform this function while checking out items to a user in the *Checkout* wizard.

Mark an Item Missing

The *Mark Item Missing* wizard is used to check out an item in the catalog to the MISSING user when staff cannot locate it. By checking out the item to this user, it changes the Current Location to MISSING. This alerts staff and shadows (hides) the item from the public, so they do not spend time or effort looking for the missing item.

To mark an item missing:

1. Within the Items group of wizards, click the *Mark Item Missing* wizard.  Mark Item Missing
2. Search for the item you want to mark missing. If you receive a hit list, highlight the appropriate title.
3. If there are multiple item records, select the item you want to change and click **Mark Item Missing**.



Mark Item Missing : Item Search

Search for: encyclopedia science

Index: Title

Library: ALL

Current: [The daring book for girls --- J 646.7 BUC --- ID:310000674](#)

KEYWORD Title encyclopedia science, ALL: 20 records

Title	Author	Pub. Year
E.encyclopedia. Science	DK Publishing, Inc.	2004
The Sage encyclopedia of social science research meth...	Lewis-Beck, Michael S.	2004
Gale encyclopedia of science	Lerner, K. Lee.	2004
Encyclopedia of computer science and technology	Henderson, Harry, 1951-	2003
Encyclopedia of environmental science	Mongillo, John F.	2000
Encyclopedia of computer science	Reilly, Edwin D.	2000

Description: Call Number/Item

The Sage encyclopedia of social science research meth...

REF H62 .L456 2004 V.1 - ARROWOOD

31070000029161 - 1 - REF-BOOK - REFERENCE -

REF H62 .L456 2004 V.2 - ARROWOOD

31070000029179 - 1 - REF-BOOK - REFERENCE -

NEWT REF H62 .L456 2004 V.2 - FEW

31070000035085 - 1 - REF-BOOK - REFERENCE -

NEWT REF H62 .L456 2004 V.3 - FEW

31070000035077 - 1 - REF-BOOK - REFERENCE -

NEWT REF H62 .L456 2004 V.1 - MOYERS

Price: \$0.00

Home location: REFERENCE

Item category 1: none

Date created: 10/12/2004

Date last charged: Never

Last discharged: Never

Date inventoried: Never

Times inventoried: 0

Item type: REF-BOOK

Current location: REFERENCE

Item category 2: none

Media desk: none

Previous user ID:

Last activity: Never

Total checkouts: 0

In-house uses: 0

Mark Item Missing Cancel

4. Click **Mark Item Missing**.

Mark Item Missing

The Sage encyclopedia of social science research methods / Lewis-Beck, Michael S.
REF H62 .L456 2004 V.2 Copy:1 ID:31070000029179

Identify item

Item ID: 31070000029179

List of Items

Set ID	Item id	Title	Current location

Get Item Information Mark Item Missing (a) Close

5. If the item does not normally circulate or check out to the public, type in the appropriate override in the field and click **Override & Mark Item Missing**.

NonCirc Item Override

Item may not be circulated

REF H62 .L456 2004 V.2 Copy: 1
31070000029179
The Sage encyclopedia of social science research methods
Lewis-Beck, Michael S.

Non-circulating item block override:

Override & Mark Item Missing Do Not Mark Item Missing

6. To mark another item missing, follow steps 2-4 again and step 5 if you receive an override screen. Once you have finished marking items missing, click **Cancel** to the Item Search window. The missing items now appear.

Mark Item Missing

Item information

Identify item

Item ID:


List of Items

Set ID	Item id	Title	Current location
	31070000029179	The Sage encyclopedia of ...	MISSING

Get Item Information Mark Item Missing (a) Close

7. Click **Close** to exit the wizard.

To see a list of missing items:

1. Open the Users group of wizards and click the *Display User* wizard.
 Display User
2. In the User ID field, type MISSING and click **Display This User**.
3. If it is not already displaying, click the **Checkouts** tab.

Name: Missing Items
 Id: MISSING
 Group ID:
 Profile name: MISSING...

Identify user
 User ID: MISSING

Routings		Reservations		Outreach		Suspension		Charge History		User Groups	
Summary		Addresses		Extended Info		Bills		Checkouts		Holds	
Starting ch...	309470001...	9/23/2009...		NEVER					BOOK		
Giving : ho...	310000611	10/25/201...		NEVER					BOOK		
The persist...	310000629	10/26/201...		NEVER					BOOK		
The Sage e...	310700000...	10/30/201...		NEVER					REF-BOOK		

Display options
☐ Checkout library ☐ Owning library
 Library: All libraries ☒ Type of checkout: Active

Display this User (a) Display Another User Close

4. To see the items missing at your library, select the library from the drop down list and verify that the button next to Owning Library is selected.
5. Click **Close** once you are done viewing the records.

To restore the item's normal status or Current Location, simply check in the item using the *Check In* wizard.

Mark an Item Lost

The *Mark Item Lost* wizard is used to mark an item in the catalog as lost and change the item's Current Location or status to LOST-CLAIM without discharging it from the user's record. When you mark an item lost, you have the option of creating a lost bill and assessing a processing fee.

When an item is marked lost, SirsiDynix Symphony does the following:

- Shadows the item in the catalog so that other users do not inquire about them.
- Prevents holds from being placed against them.
- Prevents items from being recalled or used to satisfy a hold.

- Keeps the item on the user's record until the lost item bill is paid, forgiven or waived or if it is returned to the library.
- Maintains the Current Location of LOST-CLAIM until the item returns to circulation.




When viewing item records in WorkFlows, staff will also see items marked LOST-ASSUM. The Assumed Lost report will automatically mark an item as lost after a specified period after the due date. This functions in a similar to LOST-CLAIM, but does not require that each item be marked manually.



For more information, refer to the WorkFlows online Help topic "FAQs: Marking Items as Lost."

To mark an item lost:

1. Within the Items group of wizards, click the *Mark Item Lost* wizard.
 Mark Item Lost
2. Click the *User Search* helper and search for the appropriate user record.
3. Within the list of checkouts, select one or more of the items, or click the Select All box.



Mark Item Lost : User Search

Search for: Search

Index: Name Type: ☒ Keyword ☐ Browse ☐ Browse user group

Library: ALL_LIBS

List of users

Name	User ID	Alt ID	Phone
Curtis, Cliff	210000104		

Current user checkouts

☐ Select All

Select	Title	Item ID	Date Due	Reserve	Type
<input type="checkbox"/>	Twelfth night ...	3107000039...	11/1/2010,21...		AV
<input type="checkbox"/>	Airman	310000738	11/29/2010,2...		BOOK
<input type="checkbox"/>	Influencer : t...	310000615	11/29/2010,2...		BOOK

4. Click **Mark Item Lost**.

5. Click **Mark Item Lost**.

Mark Item Lost

Influencer : the power to change anything / Patterson, Kerry, 1946-
153.85 PAT Copy:1 ID:310000615

Identify item

Item ID:

List of Items

Set ID	Item id	Title	Current location
--------	---------	-------	------------------

6. If the price field contain a zero amount, enter a price.

7. Enter or change the Processing Fee, if necessary.

Mark Item Lost : Billing for Lost Item/Processing Fee

Billing user
 User ID: 210000104
 Alt ID: Curtis, Cliff

For lost item
 Item ID: 310000615
 Title: Influencer : the power to change anythin
 Author: Patterson, Kerry, 1946-
 Price: \$24.95
 153.85 PAT

Billing info
Amount
 Lost item: \$24.95
 Processing fee: \$10.00
 Payment type: CASH

Bill User Pay Now (b) Cancel Lost Item Bill

8. If the user wants to pay for the entire bill, select the Payment Type from the drop down and click **Pay Now**. If they will pay later, click **Bill User**.
9. Click **OK** to the confirmation message.
10. Click **Close** to exit the wizard.

Display User

Alerts Notes
 Name: Curtis, Cliff
 Id: 210000104
 Group ID:
 Profile name: ADULT...

Identify user
 User ID: 210000104

Holds Routings Reservations Outreach Suspension Charge History User Groups
 Summary Addresses Extended Info Bills Checkouts

Unpaid bills: 2(\$34.95)

Title	Item ID	Reason	Owes	Billed	Date	Payment library
Influencer : the power...	310000615	LOST	\$24.95	\$24.95	10/30/2010	
Influencer : the power...	310000615	PROCESSFEE	\$10.00	\$10.00	10/30/2010	

Display this User (o) Display Another User Close

If an item is returned or found before the user pays the lost bill, Symphony displays a message when you check in the item, check it out to another user, renew the item, or put the item in transit. Symphony clears the item's LOST-CLAIM or LOST-ASSUM Current Location and removes the lost item bill from the user record. If you

assessed a lost item processing fee at the time the item was marked lost, and if the library's policies are configured, Symphony automatically removes the processing fee from the user's record as well. The overdue fine for the item is calculated and added to the user record.




Depending on the SirsiDynix Symphony policies, it is possible to have a credit account refund be automatically created on the user's record when a paid lost item is returned within a certain number of days. This is discussed in Appendix B of this training guide.

Marking an Item Claims Returned

The *User Claims Returned* wizard marks an item that a user claims to have returned. If a user receives an overdue notice but claims to have returned the materials, staff needs to mark the materials with a claims returned date. Once marked, the user no longer accrues overdue fines for that item; however, the item continues to appear on the patron's current checkout list.

A Claims Returned status is usually considered a temporary status. The item remains charged to the patron for a time until the library determines if it is necessary to declare the item lost.

To mark an item claims returned:

1. Open the Special group of wizards and click the *User Claims Returned* wizard.  User Claims Returned
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Click the *Calendar* gadget next to each item the user claims was returned and select a date. This updates the information in the Claims Returned column.



User Claims Returned

[Alerts](#) [Notes](#)

Name: Curtis, Cliff
 Id: 210000104
 Group ID:
 Profile name: ADULT...

[Identify User](#)

User ID:

[List of checkouts](#)

Checkouts: 3

Title	Date Due	Claims Returned	Current Location
Twelfth night [vid...	11/1/2010,21:11	(NEVER)	✕
Airman	11/29/2010,23:59	(NEVER)	✕
Influencer : the p...	11/29/2010,23:59	(NEVER)	✕ LOST-CLAIM

Get User Information Mark Items Claimed Returned (o) Mark Another User's Claims Returned Close

- Click **Mark Items Claimed Returned**. A “Record Updated” message appears next to each item that was claimed returned.

[List of checkouts](#)

Checkouts: 3

Title	Date Due	Claims Returned	Current Location
Twelfth night [vid...	11/1/2010,21:11	10/30/2010	Record updated
Airman	11/29/2010,23:59	(NEVER)	✕
Influencer : the p...	11/29/2010,23:59	(NEVER)	✕ LOST-CLAIM

- When these are checked in, you can enable a pop up that will alert you that this was a claimed returned item, with a prompt allowing you to edit the user’s record. This feature is also available in the *Discharging Bookdrop* wizard.

Current: **BOOKS 123**

Alert: Item Claimed Returned

A user claims to have returned this item.
 User Name: VanCott, Linda
 Date of claimed return: 4/10/2013

☐ Open the user record for editing

Discharge Cancel

-

7. Click **Close** to exit the wizard.



Special Circulation Functions

In this section, we introduce you to special circulation tasks such as marking items used, creating circulation statistics for ephemeral items, and viewing and receiving in transit items.


In this section you will learn to:

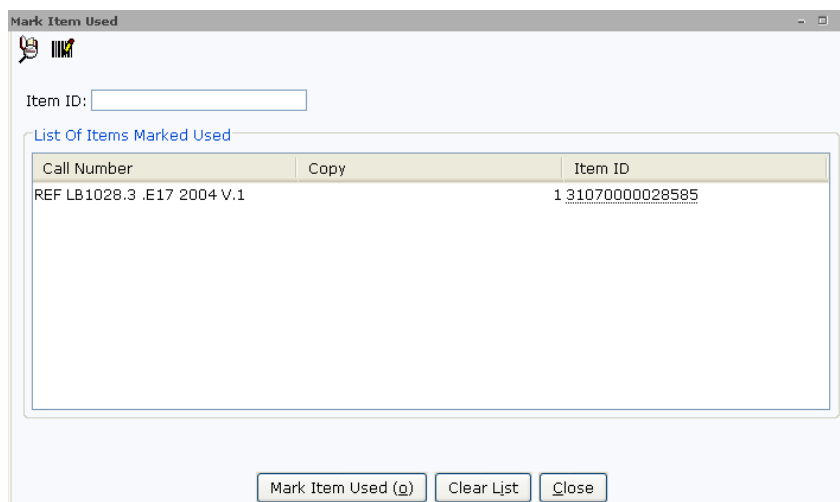
- Mark items used for statistical purposes.
- Check out impermanent materials such as forms, paperback novels, etc.
- View and receive items in transit.

Marking Items Used

The *Mark Item Used* wizard lets you track usage for items that were used in the library but not checked out by a user. Items retrieved from various areas of the library, such as the Reference or Periodical section, can be marked for statistical purposes. These items are not actually charged.

To mark an item used:

1. Open the Special group of wizards and click the *Mark Item Used* wizard.  Mark Item Used
2. Scan the item or type in the item ID and click **Mark Item Used**.



Call Number	Copy	Item ID
REF LB1028.3 .E17 2004 V.1	1	31070000028585

3. Continue to scan items until finished.



- In the *Item Search and Display* wizard, you will now see Last activity and In-house uses values. These values can be used as selection criteria within reports.

Item Search and Display

Education and technology : an encyclopedia / Kovalchick, Ann.

Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections

Education and technology : an encyclopedia / Kovalchick, Ann. - 1 - REF
 REF LB1028.3 .E17 2004 V.1
 31070000028595 - 1 - REF
 REF LB1028.3 .E17 2004 V.2
 31070000028593 - 1 - REF

Item Info Circ Info Bills Checkouts Holds Charge History Bookings

Call number information

Call number: REF LB1028.3 .E17 2004 [ZV.1] Class scheme: LC

Call library: ARROWOOD

Shadow call number N

Item information

Item ID: 31070000028585 Copy number: 1

Type: REF-BOOK Item library: ARROWOOD

Home location: REFERENCE Current location: REFERENCE

Item cat1: Item cat2:

Media desk: Number of pieces: 1

Total charges: 0 Price: \$0.00

Permanent Y Circulate N

Shadow item N

Date created: 10/10/2004
 Date last charged: Never
 Date due: none
 Last discharged: Never
 Date inventoried: Never
 Times inventoried: 0
 Previous user ID:
 Last activity: 10/30/2010
 In-house uses: 1

Extended information

Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

Return to Search Display Holdings Close

Checking Out Ephemeral Items

The *Ephemeral* wizard is used to check out impermanent materials to a library user. Libraries may have items that they want to circulate, but do not want to track for overdue notices or billing purposes. Impermanent materials can include items such as donated paperback and pamphlets.

This wizard checks out a number of copies to an item ID created for a type of impermanent materials. You can use the *Add Brief Title* wizard to create the record needed to use in the *Ephemeral* wizard.

Add Brief Title

****REQUIRED FIELD****
XX(97167.1) ID:97167-1001

Title info

Personal Author:	100	1		
Corporate Author:	110	1		
Conference Author:	111	1		
Uniform title:	130			
Title:	245			Paperback book exchange

Call number and copy info

New call number: XX(97167.1)

Library: ARROWOOD

Item type: BOOK

Home location: STACKS

Item ID: PAPERBACK

Item cat1:

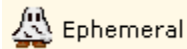
Item cat2:

The wizard checks out an item out and then immediately discharges it. The *Ephemeral* wizard repeats the charge and discharge sequence for every item presented for check out.

Checkout transactions are recorded for statistical reports and checkout data, but they are not used for generating late notices or bills.

To check out impermanent items:

1. Within the Special group of wizards, click the *Ephemeral* wizard.

A screenshot of the "Ephemeral" wizard window. The window has a title bar with the name "Ephemeral" and standard window controls. Below the title bar is a toolbar with various icons. The main area is divided into sections: "User information" (empty), "Identify User" (with a "User ID:" input field and a "Current:" dropdown showing "Arnold, Jeffrey 210000029"), "Enter item to checkout" (with an "Item ID:" input field, a "# copies:" input field, and a "Current:" dropdown showing "Education and technol... REF LB1028.3 .E17 2004 V.1 31070000028585"), and "List of checkouts" (a table with columns "Number of Copies", "Title", and "Date Due"). At the bottom are four buttons: "Get User Information", "Check Out Item To User", "Check Out To New User", and "Close".

Number of Copies	Title	Date Due
------------------	-------	----------


2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Type the number of copies.
4. Scan the barcode or type the item ID and click **Check Out Item To User**.
5. Click **Close** to exit the wizard.

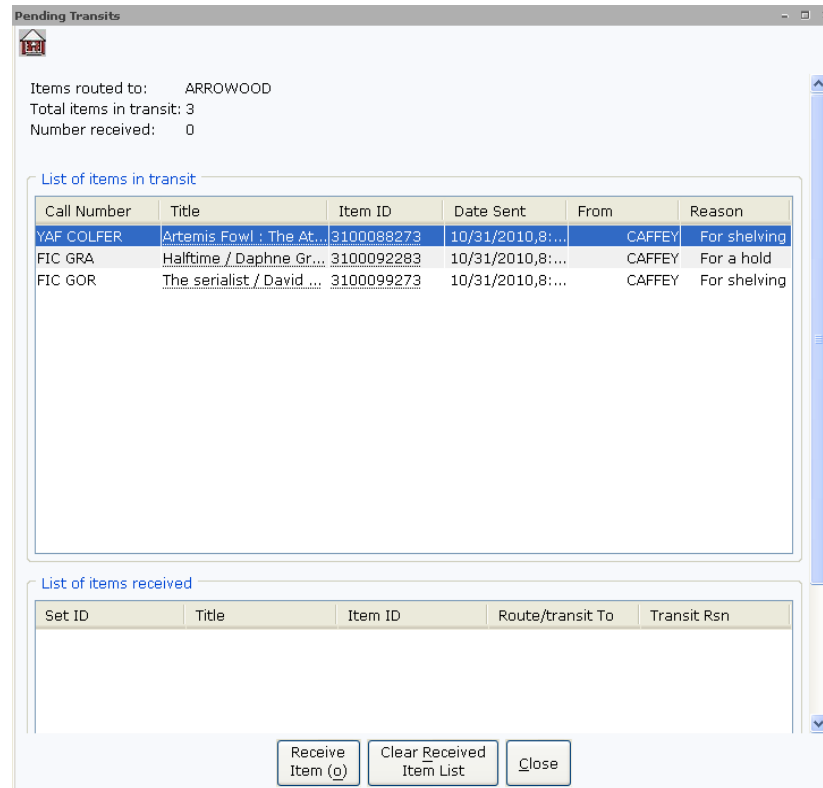
Viewing and Placing Items in Transit

In a multi-library system, you will have to receive items that have been put in transit to your library. Items in an in transit status are either being sent back to the owning library to be reshelved, or it might be to fulfill a hold request.

The *Pending Transits* wizard is used to display a list of items currently in transit to a specific library.

To view items in transit:

1. Open the In-Transit group of wizards and click the *Pending Transits* wizard.  Pending Transits



Items routed to: ARROWOOD
Total items in transit: 3
Number received: 0

List of items in transit

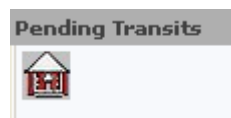
Call Number	Title	Item ID	Date Sent	From	Reason
YAF COLFER	Artemis Fowl : The At...	3100088273	10/31/2010,8:...	CAFFEY	For shelving
FIC GRA	Halftime / Daphne Gr...	3100092283	10/31/2010,8:...	CAFFEY	For a hold
FIC GOR	The serialist / David ...	3100099273	10/31/2010,8:...	CAFFEY	For shelving

List of items received

Set ID	Title	Item ID	Route/transit To	Transit Rsn
--------	-------	---------	------------------	-------------

Receive Item (a) Clear Received Item List Close


2. To see another library's in transit items, click the *Select Another Library* helper.

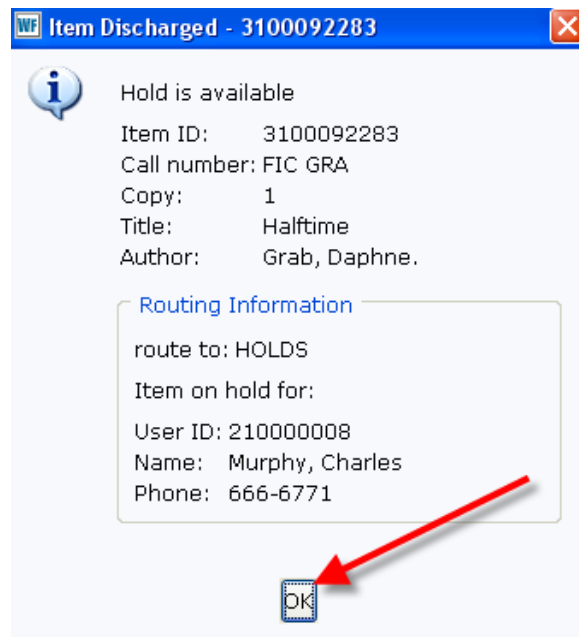


3. Select a library from the drop down list and click **OK**.
4. Click **Close** to exit the wizard.

Library staff can receive in transit items using the *Receive Transit* wizard to take items out of transit. You can perform this same function using the *Check In* wizard.

To receive an in transit item:

1. Within the Common Tasks group of wizards, click the *Check In* wizard.  Check In
2. Scan the item or type in the item ID and click **Discharge Item**.
3. For items to be placed on the hold shelf, click **OK**.



4. Continue scanning items until finished. Click **Close** to exit the wizard.



The List Transits report can provide a printed list of transits based on selections made in the report.

Appendix A – Circulation Sets

If the system is configured, library staff can create circulation sets to circulate a group of individually barcoded items as a set. This feature can be used for book club kits, ESL kits, toy kits, etc.

With this appendix, you will learn to:


- Create a circulation set.
- Check out a circulation set.
- Display circulation sets.
- Modify a circulation sets.
- Remove a circulation set.

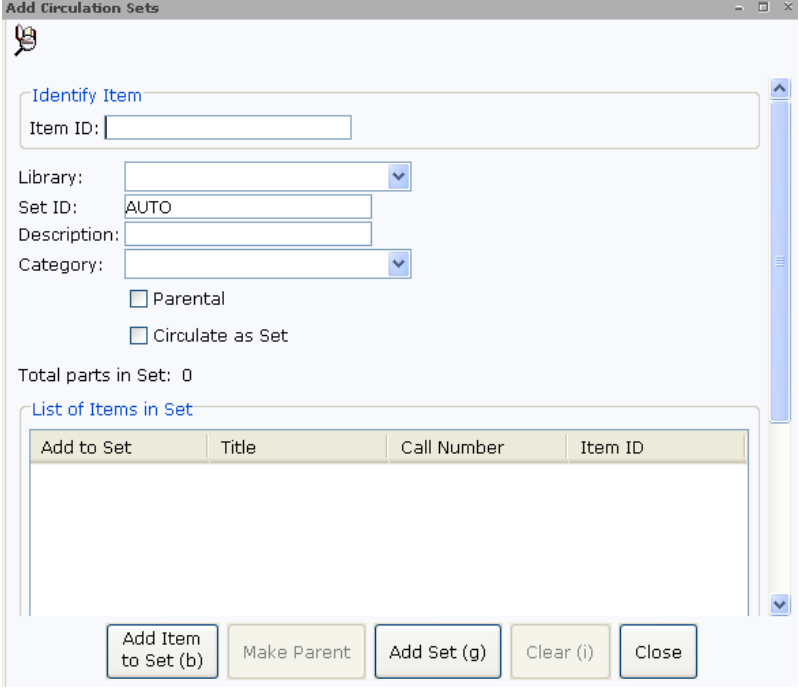
The Circulation Sets feature includes the following wizards:

- Add Circulation Sets
- Display Circulation Sets
- Modify Circulation Sets
- Remove Circulation Sets


Adding a Circulation Set

To create a circulation set:

1. Open the Maintain Sets group of wizards and click the *Add Circulation Sets* wizard.  Add Circulation Sets



The screenshot shows the 'Add Circulation Sets' wizard window. It has a title bar with the text 'Add Circulation Sets'. Below the title bar is a 'Identify Item' section with a text box for 'Item ID:'. Below that are fields for 'Library:', 'Set ID:' (with 'AUTO' entered), 'Description:', and 'Category:'. There are two checkboxes: 'Parental' and 'Circulate as Set'. Below these is the text 'Total parts in Set: 0'. The main section is titled 'List of Items in Set' and contains a table with columns 'Add to Set', 'Title', 'Call Number', and 'Item ID'. The table is currently empty. At the bottom of the window are five buttons: 'Add Item to Set (b)', 'Make Parent', 'Add Set (g)', 'Clear (i)', and 'Close'.

2. Select the *Item Search* helper to locate a title. 
3. Search for your title using the **Title** index. If more than one title appears, select your title from the list.
4. In the **Call Number/Item** tab, highlight the copy you want to include in the set.

Add Circulation Sets : Item Search

Search for:

Index:

Library:

Type: ☐ Keyword ☐ Browse ☒ Exact

Current: [To kill a mockingbird --- FIC LEE --- ID:31070000188699](#)

EXACT Item ID 31070000188699, ARROWOOD: 1 record

Title	Author	Call number
To kill a mockingbird	Lee, Harper.	FIC LEE

Description | Call Number/Item

To kill a mockingbird - Lee, Harper.

- FIC LEE - ARROWOOD
 - 31070000188637 - 1 - BOOK - STACKS
 - 31070000188699 - 2 - BOOK - STACKS
 - 31070000188698 - 3 - BOOK - STACKS**
 - 31070000188697 - 4 - BOOK - STACKS
 - 31070000396271 - 5 - BOOK - STACKS
- FIC LEE - FEW
 - 31070000188611 - 1 - BOOK - STACKS
 - 31070000188629 - 2 - BOOK - STACKS
- JUV PZ7 .L432T 1982 - MOYERS
 - 31070000188595 - 1 - BOOK - STACKS
 - 31070000188603 - 2 - BOOK - STACKS

Price: \$24.95 **Item type:** BOOK

Home location: STACKS **Current location:** STACKS

Item category 1: none **Item category 2:** none

Date created: 10/31/2010 **Media desk:** none

Date last charged: Never **Previous user ID:**

Last discharged: Never **Last activity:** Never

Date inventoried: Never **Total checkouts:** 0

Times inventoried: 0 **In-house uses:** 0

5. Click **OK**.
6. Repeat steps 2-6 until you have all of the items needed for the circulation set.
7. Type in a Set ID, or allow the system to auto-generate a set ID.
If you would prefer to use one of the item barcodes to check out the entire set, do the following:
 8. Select the Parental check box. The Set ID box becomes unavailable.
 9. Highlight one of the items in the List of Items in Set and click **Make Parent**.

Add Circulation Sets

Identify Item

Item ID:

Library:

Set ID:

Description:

Category:

☐ Parental

☐ Circulate as Set

Total parts in Set: 6

List of Items in Set

Add to Set	Title	Call Number	Item ID
<input checked="" type="checkbox"/>	To kill a mockingbird	DVD LEE	31070001829384
<input checked="" type="checkbox"/>	Understanding To kill a m...	813.54 JOH	31070000143376
<input checked="" type="checkbox"/>	To kill a mockingbird	FIC LEE	31070000188637
<input checked="" type="checkbox"/>	To kill a mockingbird	FIC LEE	31070000188699
<input checked="" type="checkbox"/>	To kill a mockingbird	FIC LEE	31070000188698
<input checked="" type="checkbox"/>	To kill a mockingbird	FIC LEE	31070000188697


Buttons: Add Item to Set (b) | Make Parent | Add Set (g) | Clear (i) | Close

10. Choose a category from the list, if necessary.
11. Type a description of the set, if necessary.
12. Select the Circulate as Set box if you want the items within the set to only circulate as part of the set. If the option is not selected, items within the set can circulate individually.
13. Select **Add Set**.
14. Click **OK**.
15. Select **Close**.

Checking Out a Circulation Set

Checking out a set of items is similar to checking out regular collection items.

To check out a circulation set:

1. Within the Common Tasks group of wizards, click the *Checkout* wizard.  **Checkout**
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

3. Scan the parental item's barcode in the Item ID field, or type the Set ID and click **Check Out Item to User**.

CheckOut

Notes

Name: Butler, Jessica
 Id: 210000043
 Group ID:
 Profile name: ADULT...

Identify user

User ID: 210000043

Street: 8979 Center St
 City, state: Spanish Fork, UT
 Zip: 86676
 Phone: 801-555-5558

Identify item

Item ID:

List of checkouts:6

Title	Item ID	Date Due	Billed	Amount Pai...	Type	Set ID
To kill a mocki...	3107000182...	11/8/2010,23...			DVD	BOOK-CLUB
To kill a mocki...	3107000018...	11/29/2010,2...			BOOK	BOOK-CLUB
To kill a mocki...	3107000018...	11/29/2010,2...			BOOK	BOOK-CLUB
To kill a mocki...	3107000018...	11/29/2010,2...			BOOK	BOOK-CLUB
To kill a mocki...	3107000018...	11/29/2010,2...			BOOK	BOOK-CLUB
Understandin...	3107000014...	11/29/2010,2...			BOOK	BOOK-CLUB


Get User Information Check Out Item To User Check Out To New User Close

4. Click **Close** to exit the wizard.

Displaying Circulation Sets

The *Display Circulation Sets* wizard is used to display a list of all items contained in a circulation set.

To display a circulation set:

1. Within the Maintain Sets group of wizards, click the *Display Circulation Sets* wizard.  Display Circulation Sets
2. Type in the Set ID, or use the *Search by Search Set ID* helper to find the set.

Display Circulation Sets

Set ID:

Description: Book Club Kit
 Circulate as Set: N
 Date Created: 10/31/2010
 Date Modified: 10/31/2010
 Owning Library: ARROWOOD

Type of Set: Non-Parental
 Created by: ADMIN
 Modified by: ADMIN
 Category:

Total parts in Set: 6

Title	Call Number	Item ID
Understanding To kill a mockingbird : a stude...	813.54 JOH	31070000143376
To kill a mockingbird / by Harper Lee.	FIC LEE	31070000188637
To kill a mockingbird / by Harper Lee.	FIC LEE	31070000188699
To kill a mockingbird / by Harper Lee.	FIC LEE	31070000188698
To kill a mockingbird / by Harper Lee.	FIC LEE	31070000188697
To kill a mockingbird / a Pakula-Mulligan, Bren...	DVD LEE	31070001829384

Display This Set Display Another Set (b) Close

- After viewing the set, click **Close** to exit the wizard.

You can also use the *Item Search and Display* wizard to view circulation sets. Set ID is available in the Index drop down or search by title to view a set.

Item Search and Display

Search for:

Index:

Current:

BROWSE Set ID book-club: 1 record

Set ID	Description	Type
BOOK-CLUB	Book Club Kit	Non-Parental

Description Items In Set

Set ID: BOOK-CLUB; 6 items

Title	Call number	Item ID
Understanding To kill a ...	813.54 JOH	31070000143376
To kill a mockingbird / by...	FIC LEE	31070000188637
To kill a mockingbird / by...	FIC LEE	31070000188699
To kill a mockingbird / by...	FIC LEE	31070000188698
To kill a mockingbird / by...	FIC LEE	31070000188697
To kill a mockingbird / a ...	DVD LEE	31070001829384


Price: \$0.00
 Home location: STACKS
 Item category 1: none
 Date created: 1/23/1996
 Date last charged: 10/31/2010
 Last discharged: Never
 Date inventoried: Never
 Times inventoried: 0

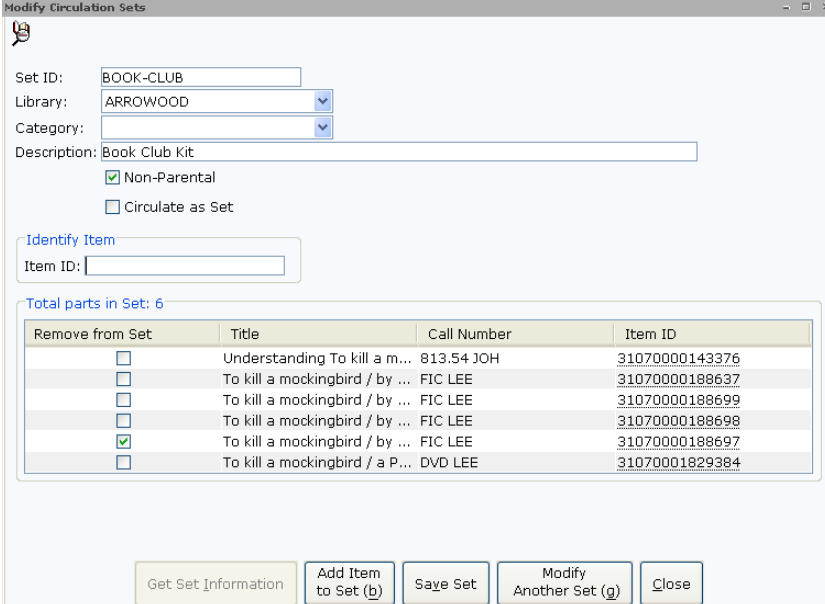
Detailed Display Close

Modifying a Circulation Set

Staff can add items to a set or remove individual items from the set using the *Modify Circulation Set* wizard.

To remove an item from a circulation set:


1. Within the Maintain Sets group of wizards, click the *Modify Circulation Sets* wizard.  Modify Circulation Sets
2. Type the Set ID or use the *Item Search* helper to locate the circulation set to be modified.
3. Select the Remove from Set check box next to the item(s) you want to remove.



Remove from Set	Title	Call Number	Item ID
<input type="checkbox"/>	Understanding To kill a m...	813.54 JOH	31070000143376
<input type="checkbox"/>	To kill a mockingbird / by ...	FIC LEE	31070000188637
<input type="checkbox"/>	To kill a mockingbird / by ...	FIC LEE	31070000188699
<input type="checkbox"/>	To kill a mockingbird / by ...	FIC LEE	31070000188698
<input checked="" type="checkbox"/>	To kill a mockingbird / by ...	FIC LEE	31070000188697
<input type="checkbox"/>	To kill a mockingbird / a P...	DVD LEE	31070001829384

4. Click **Save Set**.
5. Click **OK**.

To add an item to a circulation set:

1. Within the Maintain Sets group of wizards, click the *Modify Circulation Sets* wizard.  Modify Circulation Sets
2. Type the Set ID or use the *Item Search* helper to locate the circulation set to be modified.

3. Scan in the barcode of the item you want to add or type in the item ID and click **Add Item to Set**. You can also use the *Item Search* helper to locate the item to add to the list.

Modify Circulation Sets

Set ID: BOOK-CLUB
 Library: ARROWOOD
 Category:
 Description: Book Club Kit
☒ Non-Parental
☐ Circulate as Set

Identify Item
 Item ID:

Total parts in Set: 5

Remove from Set	Title	Call Number	Item ID
<input type="checkbox"/>	Understanding To kill a m...	813.54 JOH	31070000143376
<input type="checkbox"/>	To kill a mockingbird / by ...	FIC LEE	31070000188637
<input type="checkbox"/>	To kill a mockingbird / by ...	FIC LEE	31070000188699
<input type="checkbox"/>	To kill a mockingbird / by ...	FIC LEE	31070000188698
<input type="checkbox"/>	To kill a mockingbird / a P...	DVD LEE	31070001829384

Get Set Information Add Item to Set (b) Save Set Modify Another Set (g) Close

To add an item to a set, scan the barcode or search for the title with the Title Search helper

4. Once you have added all of the required items, click **Save Set**.
5. Click **Close** to exit the wizard.

Removing a Circulation Set

The *Remove Circulation Sets* wizard is used to remove an entire set.

To remove a circulation set:

1. Within the Maintain Sets group of wizards, click the *Modify Circulation Sets* wizard. Remove Circulation Sets
2. Type the Set ID or use the *Item Search* helper to locate the circulation set to be removed.

Remove Circulation Sets

Set ID:

Description: Book Club Kit
 Circulate as Set: N
 Date Created: 10/31/2010
 Date Modified: 10/31/2010
 Owning Library: ARROWOOD

Type of Set: Non-Parental
 Created by: ADMIN
 Modified by: ADMIN
 Category:

Total parts in Set: 5

Title	Call Number	Item ID
Understanding To kill a mockingbird : a s...	813.54 JOH	31070000143376
To kill a mockingbird / by Harper Lee.	FIC LEE	31070000188637
To kill a mockingbird / by Harper Lee.	FIC LEE	31070000188699
To kill a mockingbird / by Harper Lee.	FIC LEE	31070000188698
To kill a mockingbird / a Pakula-Mulligan,...	DVD LEE	310700001829384

3. Click **Remove This Set**.
4. Click **Yes**.
5. Click **OK**.
6. Click **Close** to exit the wizard.

Appendix B – Credit User Accounts

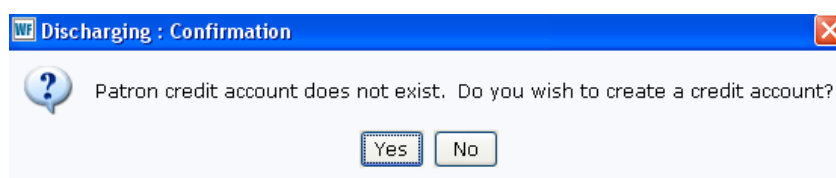
With some policies configured in SirsiDynix Symphony, the Credit User Account feature allows library users to pay bills, fines, privilege fees, and more from a credit or deposit amount. This feature also allows library staff to manually issue refund credit for paid bills, such as reimbursing the user for a paid lost item bill when the item is returned to circulation. Funds can be withdrawn from a credit user account for various library-defined reasons.

Policies will define the “rules” for paying bills with the user credit account, including the types of bills that can be paid with the account and the maximum credit amount allowed. As bills are paid from the account, library staff can review the user account balances and the credit transaction histories. Circulation wizards can be configured to automatically pay bills directly from these credit accounts. For example, as overdue fines are created, when items are checked in, the system will automatically pay these fines with credit account money, as long as the credit balance is more than the amount billed.

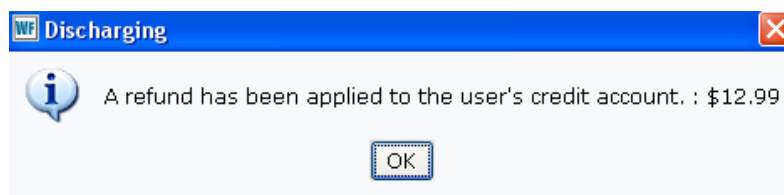
Refunding Paid Bills

Libraries may not want to accept money to create a user’s credit account, but will want paid lost bills to be refunded when returned to circulation. When SirsiDynix Symphony policies are in place, a refund can be issued to the user when a paid lost item has been checked back in.

Below is what staff will see when they check in a paid lost item for a user that does not have a credit account established:



After clicking **Yes** to create the credit account, the following message will appear including the amount credited to the user:



When displaying a user's record in the *Display User* wizard, the Credit Balance will appear in the **Summary** tab.

Display User

Notes

Name: Stevens, Cassie
Id: 210002739
Group ID:
Profile name: JUVENILE...

Identify user

User ID:

Street: 12344 Olive Boulevard
Line: C/O Dan Stevens
City, state: Creve Coeur, MO
Zip: 63141
Phone: 314-887-2937

Routings	Reservations	Outreach	Suspension	Charge History	User Groups
Summary	Addresses	Extended Info	Bills	Checkouts	Holds

User key: 206
Status is: OK
Profile name: JUVENILE
User cat1: FEMALE...
User cat3: MIDDLE...
User cat5:
Library: ARROWOOD...
Language: ENGLISH


Privilege expires: 10/21/2012
Group ID:
Group name:
User cat2: ENGLISH...
User cat4:
Birth date: NEVER
Age: 0
Charge history rule: CIRCRULE

Next allowed loan date:
Checkouts: 1
Extended info: yes
Claims returned: none
Outreach user: no

Amount owed: none
Unpaid bills: none
Bookings: none
Orders: none

Credit balance: \$12.99
Holds: none
Routings: none
Distributions: none
Requests/messages: none

Display this User (o) Display Another User Close


Specific information about the credit balance can be found by clicking the *Display the Full Credit Account Transaction History* helper. 

Display User: Display the full credit account transaction history

Date Creat...	Title	Item Id	Bill Reason	Credit Rea...	Amount
10/31/2010...	Purplidious	310000747	LOST	AUTOREFUND	\$12.99

OK

To manually refund a paid bill:

1. Open the Special group of wizards, and click the *Credit User Account* wizard.  Credit User Account
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

3. Click the *Manual Refund* helper.



Credit User Account : Manual Refund

Paid bills: 1(\$0.00)

☐ Select All

Refund	Title	Item ID	Reason	Owes	Billed	Date
<input type="checkbox"/>	Mr. Monk in tr...	3100011...	DAMAGE	\$0.00	\$15.00	11/12/2010

OK Cancel

4. Select the bill or bills you want to refund.
5. Click **OK**.
6. Click **Cancel**.

Credit Transaction Account

Credit balance: \$15.00

Date Created	Title	Item Id	Bill Reason	Credit Reason	Amount
11/12/2010,1...	Mr. Monk in tr...	310001172	DAMAGE	AUTOREFUND	\$15.00

The selected bills are refunded and the bill amounts are credited as a refund credit in the user's credit account.



The system can be configured to automatically refund paid lost items within a particular time period. For example, a library may not refund paid lost items after 30 days. This is configured in the Default Price policy by administrators.

To withdraw funds for a paid lost item:

1. Within the Special group of wizards, click the *Credit User Account* wizard.
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Click the *Manual Withdrawal* helper.

Credit User Account : Manual Withdrawal

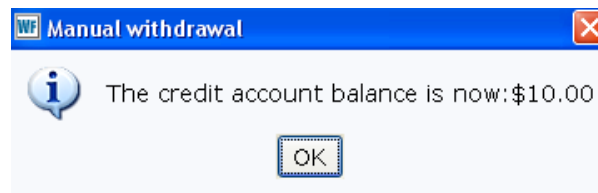
User ID: 210002739

Credit balance: \$12.99
 Date created: 10/31/2010,10:58
 Date last updated: 10/31/2010,10:58

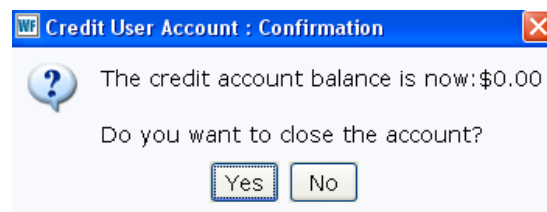
Amount: \$0.00
 Payment type: CASH
 Credit reason: AUTOPAY

Withdraw Funds (o) Close Account Cancel (b)

4. Specify the amount of money to be withdrawn from the credit account, the payment type, and the credit reason (the reason for withdrawal).
5. Click **Withdraw Funds**.
6. Do one of the following:
 - If the remaining credit account balance is greater than \$0.00, a dialog box displays the current remaining account balance. Click **OK** to close the dialog box and return to the wizard.



- If the remaining credit account balance is greater than \$0.00, a dialog box displays and asks if you want to close the user's credit account. Click **Yes** to close the account, or **No** to keep the credit account open. After clicking **Yes** or **No**, you are returned to the wizard.





Credit Transaction Account

Credit balance: \$10.00

Date Creat...	Title	Item Id	Bill Reason	Credit Rea...	Amount
11/15/2010,...				LIBREFUND	\$25.00
11/15/2010,...				DEPOSIT	\$10.00
11/15/2010,...	The sun	3107000045...	LOST	AUTOREFUND	\$25.00

Closing a User's Credit Account

To close a credit account:

1. Within the Special group of wizards, click the *Credit User Account* wizard.  Credit User Account
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Click the *Manual Withdrawal* helper. 
4. Note the current balance in the user's credit account, if any.
5. Do one of the following:
 - If the user's balance is currently \$0.00, click Close Account.

Credit User Account : Manual Withdrawal

User ID: 210002739

Credit balance: \$0.00
Date created:
Date last updated:

Amount: \$0.00

Payment type: CASH

Credit reason: AUTOPAY

Withdraw Funds (W) Close Account Cancel (B)

- If the user's balance is greater than \$0.00, specify the current balance in the Amount field and select the payment type and the credit reason (the reason for withdrawal).

Click **Withdraw Funds**. Click **Yes** to close the credit account.

6. Click **OK** to confirm the account has been closed.

Appendix C – Offline Circulation

Offline circulation is the standalone mode of the WorkFlows client. Offline WorkFlows is used to run a SirsiDynix Symphony WorkFlows-style workstation without actually connecting to the Symphony server.

The Offline toolbar provides libraries an automated method to log transactions if the server is unavailable. The data is saved to the hard drive of the PC and automatically transferred to the server. A report will be run system administrators to apply the transaction files to the Symphony database.

Using Offline

The following conditions apply to offline:

- The Offline toolbar can only record activities based on the commands that it can perform.
- Transactions performed in Offline mode must have either an Item ID and/or a User ID.
- WorkFlows cannot search or display information from the Symphony database about items or users while using Offline, since the workstation is temporarily disconnected from the host computer where all of the information is stored.
- Data recorded by Offline will be copied from the hard drive of the PC to the server automatically on the next connection to the server. The system administrator will run the Load Offline Transaction report, which will then try to perform each recorded transaction as if a staff member was at a regular workstation. Errors result when an activity recorded at an Offline workstation would have been blocked or otherwise fail when done in a real Symphony database.

Starting and Using Offline

To log into Offline mode:

1. Start the SirsiDynix Symphony Workflows client.
2. In the Configuration window, select the **Operate in Offline Mode** check box.

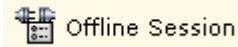
3. Click **OK**.
4. Select the Offline toolbar.



Staff will see all toolbars in Offline mode, but only the Offline toolbar can be used.

To establish Offline session settings:

1. Click the *Offline Session* wizard.



2. In the User Access list, select the user to associate with the offline transactions, typically CIRC. This is a required field.
3. In the Library list, select the home library. This is the library associated with the transactions that are ultimately loaded. This is a required field.
4. Accept the default values Current Date and Current Time. Transactions recorded at the workstation will be stamped with the PC time.
5. If necessary, enter a Default Due Date using the gadget. When you leave this field blank, WorkFlows will calculate the due date when the administrator loads offline transactions to the server.
6. Do not change the Log Directory path as this is where the WorkFlows client writes the transaction log for all activities performed in the Offline toolbar.

7. Select the Use User Delinquent List File check box if the file was generated recently.



This list will not be available for the time staff uses Offline during “go-live,” which is the time you are no longer connecting to your legacy system and where Symphony is not yet available.

8. Click OK.



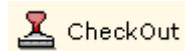
When closing out of the initial Offline session, a message will appear asking if the user wants to save the property changes. Once these values have been saved to the PC, they will remain each time staff uses the Offline toolbar.

Checking Out Items Offline

The Offline *Checkout* wizard checks out material to users when using the offline mode.

To check out materials in offline:

1. In the Offline toolbar, click the *Checkout* wizard.



Item ID	Alt due date	User ID
---------	--------------	---------

2. Scan the user's barcode or type in the User ID and press Enter. The cursor will move to the Item ID field.
3. If necessary, click the *Alt Due Date* gadget to set a different due date than the one you may have set in the session settings.
4. Scan the barcode of the item or type in the Item ID and click **Check Out Item To User**.
5. If the delinquent list file is used and the user has a delinquent status, click **OK** to continue the checkout.
6. Continue entering barcodes until all items are checked out.
7. When you are finished checking out to the user, click **Check Out To New User** to check items out to a different user or click **Close** to exit the wizard.



If the workstation has a receipt printer, you can print date due slips.

When checking out an item to a user who is blocked, barred or delinquent because they have unpaid bills or overdue items, a warning message can be displayed.

The screenshot shows a checkout interface with the following fields:

- User ID: 210000009
- Item ID: 310000537
- Alt due date: [dropdown menu]

Below these fields is a table with the following headers:

Item ID	Alt due date	User ID
---------	--------------	---------

A warning dialog box is displayed in the foreground with the following text:

210000009 is Delinquent


The dialog box includes a yellow warning icon and an OK button.

User ID: 210000063

Item ID: 31070000471934

Alt due date:

Item ID	Alt due date	User ID
---------	--------------	---------

 210000063 is Blocked

OK

This message will only appear for users with a Delinquent status where the **Update User Delinquency Status** (Setdelinq) report has been run with the option to 'Generate list of delinquent users' checked.



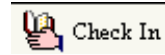
Users with a status of **BLOCKED** or **BARRED** cannot check out items in offline mode.

Checking In Items Offline

The Offline *Discharging* wizard checks in material when using the offline mode.

To discharge materials in offline:

1. In the Offline toolbar, click the *Discharging* wizard.

A screenshot of the "Discharging" wizard window. It has a title bar "Discharging" with standard window controls. Inside, there are two input fields: "Item ID:" and "Date of discharge:". The "Date of discharge:" field contains the text "11/17/2010" and has a small calendar icon to its right. Below these fields is a large rectangular area with a header containing "Item ID" and "Date of discharge". At the bottom of the window are three buttons: "OK", "Clear Discharge List", and "Cancel".

2. If necessary, use the *Date of Discharge* gadget to select a different date.
3. Scan the item's barcode or type in the Item ID and click **OK**.
4. After all the items have been checked in, click **Cancel** to exit the wizard.



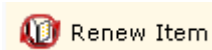
When discharging items in a circulation set, you will need to scan each item.

Renewing Items Offline

The Offline *Renew Item* wizard will renew items already checked out to a user.

To renew items in offline:

1. In the Offline toolbar, click the *Renew Item* wizard.

A screenshot of the "Renew Item" wizard dialog box. The dialog has a title bar "Renew Item" with standard window controls. Inside, there are two input fields: "Item ID:" and "Alt due date:". The "Alt due date:" field has a small calendar icon to its right. Below these fields is a large empty rectangular area. At the bottom of the dialog are "OK" and "Cancel" buttons.

2. If necessary, click the *Alt Due Date* gadget to set a different due date than the one you may have set in the session settings.
3. Scan the barcode of the item or type in the Item ID and click **OK**.
4. Continue entering barcodes until all items are renewed.
5. Click **Cancel** to exit the wizard.



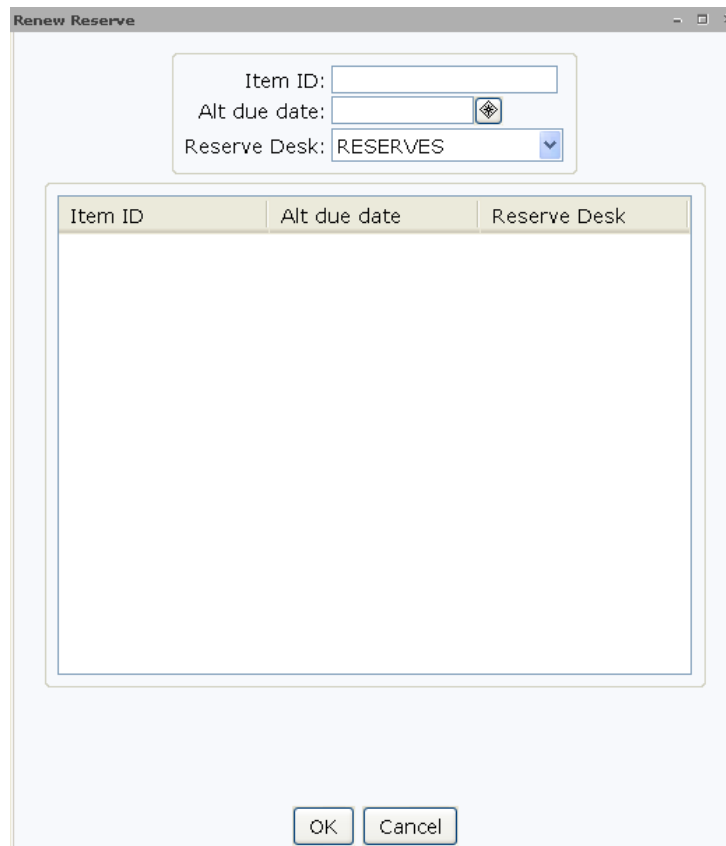
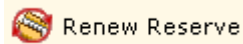
If the workstation has a receipt printer, you can print date due slips.

Renewing Reserves Offline

The Offline *Renew Reserve* wizard will renew reserve items already checked out to a user.

To renew reserve items in offline:

1. In the Offline toolbar, click the *Renew Reserve* wizard.



The image shows a screenshot of the 'Renew Reserve' wizard dialog box. At the top, there are three input fields: 'Item ID:' with a text box, 'Alt due date:' with a date picker icon, and 'Reserve Desk:' with a dropdown menu currently set to 'RESERVES'. Below these fields is a large empty rectangular area, likely for a list of items. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

2. If necessary, use the Reserve Desk drop down to select a different reserve desk.
3. If necessary, click the *Alt Due Date* gadget to set a different due date than the one you may have set in the session settings.
4. Scan the barcode of the item or type in the Item ID and click **OK**.
5. Continue entering barcodes until all items are renewed.
6. Click **Cancel** to exit the wizard.



If the workstation has a receipt printer, you can print date due slips.

Registering a User Offline

The *User Registration* wizard will allow you to register a user in offline mode.

To register a user in offline:

1. In the Offline toolbar, click the *User Registration* wizard.



User Registration

The screenshot shows the 'User Registration' wizard window with the 'User information' tab selected. The form contains the following fields and controls:

- User ID: [Text box]
- Alternate ID: [Text box]
- Title: [Text box]
- First name: [Text box]
- Preferred name: [Text box] ☐ Use preferred name
- Middle name: [Text box]
- Last name: [Text box]
- Suffix: [Text box]
- Library: [Dropdown menu, currently showing 'ARROWOOD']
- User department: [Text box]
- Birth date: [Text box with calendar icon]
- User profile: [Dropdown menu, currently showing 'PUBLIC']
- Language: [Dropdown menu, currently showing 'ENGLISH']

At the bottom right, there are 'OK' and 'Cancel' buttons.

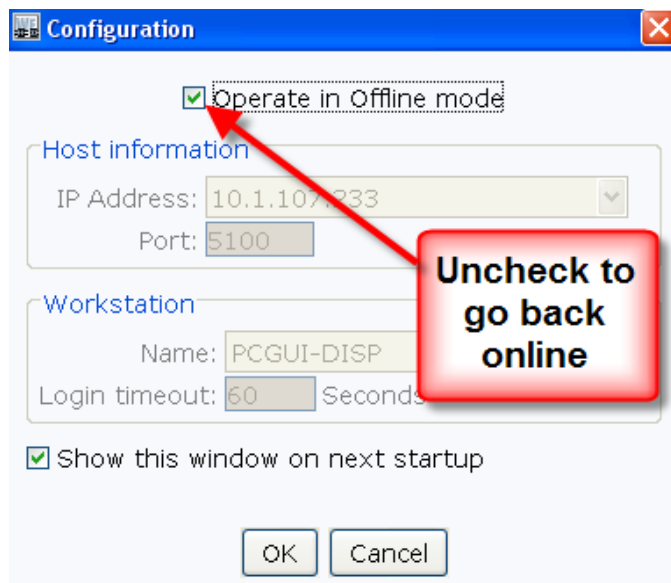
2. Enter the user information in the **User Information** tab. The following fields are required:
 - User ID
 - Last Name
 - Library
 - User Profile
 - Language
3. Add address information about the user on the **User Address** tab.
4. Enter any additional notes regarding the user in the **User Extended Information** tab.
5. Click **OK**.
6. Click **OK**.
7. Click **Cancel** to exit the wizard.

Going Back Online

Once the server becomes available again, you can send the recorded transactions to the server and apply them to the SirsiDynix Symphony database.

To send offline transactions to the server:

1. Close the Offline WorkFlows client.
2. Start the WorkFlows client and clear the **Operate in Offline Mode** check box.



3. Click **OK**.
4. Enter your WorkFlows login and PIN and click **OK**.

When WorkFlows connects with the server, the log created on the PC is automatically transferred to the server.

The system administrator will run the Load Offline Transactions report to combine, sort, and process each file that was sent to the server.

The system administrator will run two other reports to add the history logs to the monthly statistics logs.


Appendix D – User Groups

The User Groups tab allows you to link user records together for circulation purposes.

This can be used in public library settings to link together members of the same family. The system can be configured to allow the parents to see what their children have checked out and what bills they have. It can also be configured so that all users will inherit the worse case delinquency from any member of the group. For example, if the parent's status is delinquent but the child's is blocked, the parent's status will therefore be blocked.

It can also be used in academic library settings to provide "proxy" charge functionality. The "proxy" charge allows group members to charge items for a designated "head" group member and apply the charges to the "head" group member's card.

To create a new user and assign them to a group:

1. Navigate to the Circulation toolbar and open the Users group of wizards.
2. Click the *User Registration* wizard.  User Registration
3. Select a Profile Name using the drop down, if necessary.
4. Enter the user information in the available tabs and fields.
5. Click the **User Groups** tab.
6. Perform one of the following actions:
 - To create a new group name, enter the Group Name into the field.
 - To add this user to an existing group, click the *Group Name* gadget, search for and select the name, then click **OK**.
7. With the drop down, change the Responsibility Policy, if necessary.
8. Make any necessary changes to the Responsibility Type options.

The screenshot shows the 'User Registration' window with the 'User groups' tab selected. The top section displays user details: Name: Jacob, Irène; Id: 210007729; Group ID: ; Profile name: ADULT... Below this is a tabbed interface with 'Basic Info', 'Privilege', 'Demographics', 'Addresses', 'Extended Info', and 'User groups'. The 'User groups' tab contains the following fields and options:

- Group name: 7753
- Responsibility policy: PARENT (dropdown)
- Responsibility level: LINKED
- Responsibility type: HEAD
- ☒ Display charges
- ☒ Display holds
- ☒ Checkout holds
- ☒ Remove holds
- ☒ Display bills
- ☒ Pay bills
- ☐ Notice master
- ☒ Allow group choice

At the bottom are three buttons: 'Save', 'Register Another User', and 'Close'.

9. Click **Save**.



To add an existing user to a group, use the *Modify User* wizard.



If you clone/copy a user, the Group Name will copy over from the other user record.


To display user group information:


1. Within the Users group of wizards, click the *Display User* wizard.
2. Search for a user within the same group.
3. To view the user group bills, click the *Display User Group Bills* helper.



Display User



4. When finished viewing the information, click **Cancel**.
5. To view the items checked out to the group members, click the *Display User Group Charges* helper. 

6. When finished viewing the information, click **Cancel**.
7. To view the items on hold for the user group, click the *Display User Group Holds* helper. 

Display User : 7753 (holds)

- 7753
 - 210007729
 - Now and then
 - 210007720
 - Fairy Haven and the quest for the wand

Name: Jacob, Maurice
 Id: 210007720
 Group ID:
 Profile name: JUVENILE...

Hold Info

Title: Fairy Haven and the quest
 Status: unavailable
 Pickup library: ARROWOOD
 Placed at library: ARROWOOD
 Level: TITLE
 Range: SYSTEM
 No hold allowed override: N
 Date placed: 11/22/2010
 Expires: 5/21/2011
 Notified: NEVER
 Reserve: N
 Recall Status: NO

Lookup Another User Group Return To Search List Cancel

- When finished viewing the information, click **Cancel**.
- To view general user group information, click the **User Groups** tab.

Summary		Addresses		Extended Info		Bills	Checkouts
Holds	Routings	Reservations	Outreach	Suspension	Charge History	User Groups	
Group name: 7753 Responsibility policy: CHILD Responsibility level: LINKED Responsibility type: NONE Number of group members: 2 Date created: 11/22/2010						Display charges: N Display holds: N Checkout holds: N Remove holds: N Display bills: N Pay bills: N Notice master: N Allow group choice: N	
User Group Number of group members: 2							
User name	User ID	Notice master	Status	Bills	Estimated fin...	Overdues	
Jacob, Irène	210007729	N	DELINQUENT		\$0.50	1	
Jacob, Maurice	210007720	N	DELINQUENT	1	\$13.50	2	

- Click **Close** to exit the wizard.

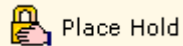
Appendix E – Book By Mail

If your library mails items to users, the books by mail functionality allow items placed on hold to be marked for shipment. Based on policies set up by the system administrator, shipping charges can be calculated based on selected mail options.

The *Place Hold* wizard offers options to flag items designated to be mailed to users. The *Mail Items* wizard will be used to charge/checkout an item to a user via Books by Mail.

To place a hold that will be mailed to a user:

1. Open the Holds group of wizards and click the *Place Holds* wizard.



2. Search for the user who is placing the hold.
3. Search for the item they want to place on hold.
4. Select the Mail Item to User check box.

A screenshot of the "Place Hold" wizard interface. The window title is "Place Hold". It contains several sections: "Notes" with user and item details; "Identify User" with a text input for "User ID" and address fields; "Identify Item" with a text input for "Item ID"; "Hold Info" with a checked "Mail Item to User" box, "Pickup at:" dropdown, "Delivery Method:" dropdown, "Expires:" date field, "Estimated shipping cost:" field, "Comments:" text area, "Date suspended:" and "Date unsuspended:" date fields; "Level/Range" with radio buttons for "Level" (Copy, Title) and "Range" (Library, Group, System); and "Recall status" with radio buttons for "Allow Recall", "No Recall", and "Recall now (RUSH)". At the bottom are buttons for "Get User Information", "Get Item Information (b)", "Place Hold", "Place Hold for Another User (g)", and "Close".

5. Using the drop down, select the Delivery Method.

Hold Info

☒ Mail Item to User

Pickup at: ARROWOOD

Delivery Method: USPS

Comments:

Date suspended:

Expires: 5/21/2011

Estimated shipping cost: \$3.00

Date unsuspended:

The cost is automatically assessed based on policies

6. Make any other necessary selections.

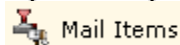
7. Click **Place Hold**.

8. Click **Close** to exit the wizard.

Once an item has been placed on hold, staff will use the *Mail Item* wizard to check out the item to the user.

To check out a book to be sent by mail:

1. Open the Special group of wizards and click the *Mail Items* wizard.



2. Scan the barcode of the item.

3. Do one of the following:

- If the user already has an existing package scheduled for mailing, the Shipping Package Already Exists dialog box displays the user ID, the user's name, the tracking number of the existing package, and the existing package information. The current item can be added to an existing shipping record by clicking **Yes**, or you can create a new shipping record by clicking **No**. If **Yes**, the existing Tracking Number will appear.

Shipping package already exists.

Add this item to existing shipping package?

Shipping package for:

User ID: 210002100

User name: McAvoy, James Andrew

Tracking number: 6000 1830 0003 6479

Created: 11/22/2010,12:33

Mail service: USPS

Cost: 3.00

Yes No

- If there is no existing package, type a new Tracking Number. The maximum length of this field is 80 characters. When the tracking number is entered, the **Confirm Shipment** button is activated and is the default action when you press Enter.

Mail Items

Name: McAvoy, James Andrew
 Id: 210002100
 Group ID:
 Profile name: HOMEBOUND...

America transformed : globalization, inequality, and power / Hytrek, Gary J.
 305.512 HYT Copy:1 ID:310000255

Identify item
 Item ID: 310000255

Shipping Info
 Billed:
 Mail Service: USPS
 Tracking Number: 7008 1830 0003 6479 0792
 Comment:

Item ID	Title	Date Due	Tracking Number	Estimated Shippin...
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Get Item Information Check Out Item To User Confirm Shipment (b) Close

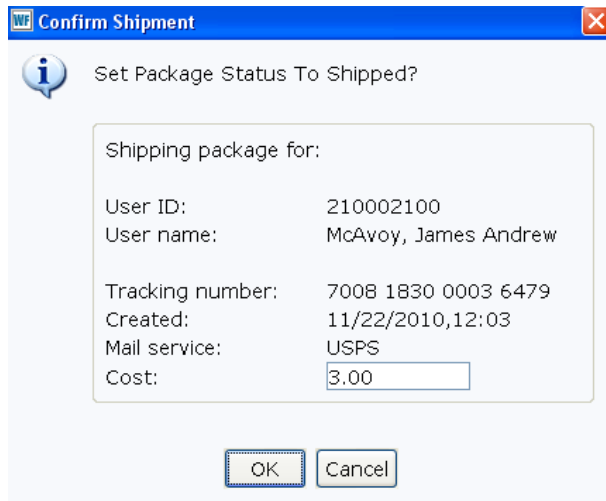
4. Type in a comment, if desired.
5. Click **Check Out Item To User**.

Shipping Info
 Billed: \$0.00
 Mail Service: USPS
 Tracking Number: 7008 1830 0003 6479 0792
 Comment:

Item ID »	Title	Date Due	Tracking Number	Estimated Shippin...
310000255	America transforme...	12/27/2010	7008 1830 0003 64...	\$3.00

Get Item Information Check Out Item To User Confirm Shipment (b) Close

6. If you are ready to ship the package, click **Confirm Shipment**.



Confirm Shipment

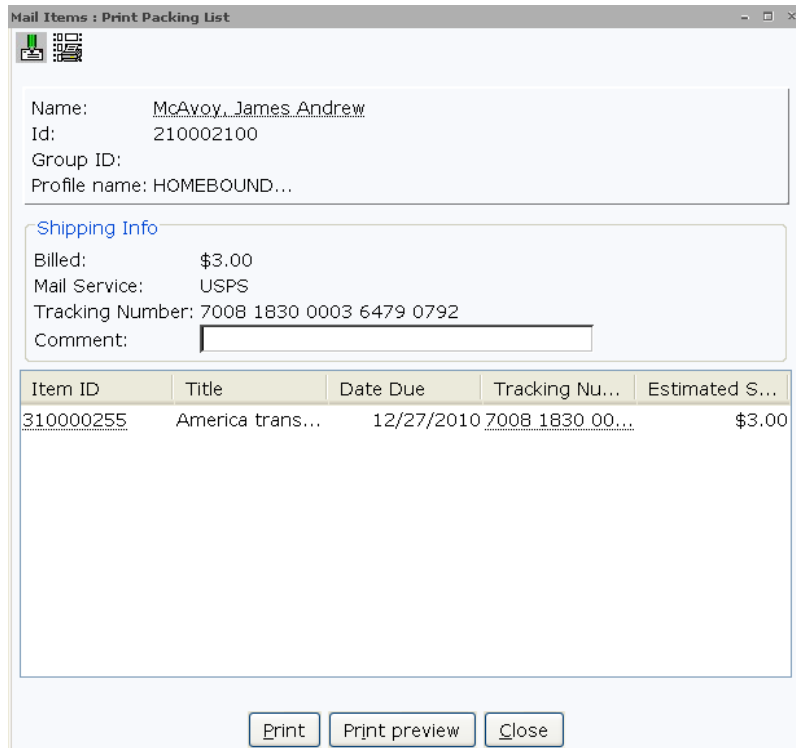
Set Package Status To Shipped?

Shipping package for:

User ID: 210002100
 User name: McAvoy, James Andrew
 Tracking number: 7008 1830 0003 6479
 Created: 11/22/2010,12:03
 Mail service: USPS
 Cost:

OK Cancel

7. Click **OK**.



Mail Items : Print Packing List

Name: McAvoy, James Andrew
 Id: 210002100
 Group ID:
 Profile name: HOMEBOUND...

Shipping Info
 Billed: \$3.00
 Mail Service: USPS
 Tracking Number: 7008 1830 0003 6479 0792
 Comment:

Item ID	Title	Date Due	Tracking Nu...	Estimated S...
310000255	America trans...	12/27/2010	7008 1830 00...	\$3.00

Print Print preview Close

8. Click to print the packing slip or click **Close**.

9. Click **Close** to exit the wizard.

